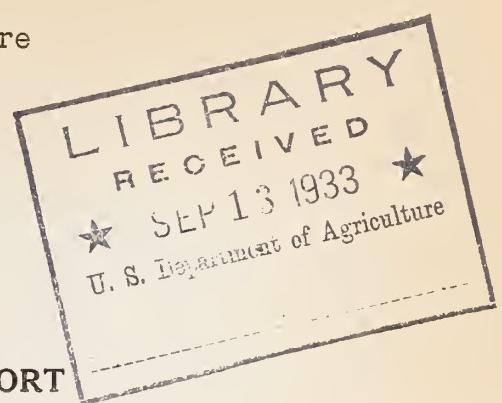


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United States Department of Agriculture
Bureau of Agricultural Economics
Foreign Agricultural Service



SUMMARY OF THE APPLE AND PEAR EXPORT
SEASON, 1932-33

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Washington, D. C.
August 1933

Summary

Although the volume of fresh apple and pear exports from the United States held up fairly well, the 1932-33 (July to June) export season proved to be the most unsatisfactory season in point of returns to American growers since the war. This is explained by the low purchasing power of our foreign markets and the numerous trade barriers which have been raised against United States fruit. All important countries to which American apples and pears are shipped have restricted the imports of these products in some way or another in the last 3 or 4 years but especially so in the 1932-33 season.

Despite a sharp decrease in dollar returns to American growers, prices of American apples in England, in terms of sterling, have declined only about 10 percent as compared with a decline of 50 percent in the British general commodity price level in the 10-year period, 1924-33. This has been due to the sharp increase in the demand for apples, along with other fruits, on the part of the British consumer.

There are fluctuations in the prices of American apples in England, due to temporary shortages or over-supplies but the price level for the season is determined largely by the supply of export apples in the United States. Exports of apples from the United States to the United Kingdom have varied directly with the size of the apple crop in the 10-year period, 1923-24 to 1932-33. The supply of Canadian and English apples did not affect the exports to any considerable extent. The prices paid for British home-grown apples are explained mainly by the size of the English crop. In other words, the prices of United States apples and English apples do not appear to have had much influence upon each other but seem to be determined quite independently of each other.

Exports of fresh apples approximated 14,000,000 bushels compared with 18,000,000 in 1931-32 and with an average of 16,500,000 bushels in the preceding five years. Exports were valued at \$16,600,000 as against \$26,600,000 in 1931-32 and an average of \$31,200,000 in the 5-year period, 1926-27 to 1930-31.

Fresh pear exports approached record proportions but prices were extremely low. Total exports amounted to 2,400,000 bushels compared with 1,800,000 in 1931-32 and 1,600,000 bushels in the previous 5-year period. Exports were 32 percent greater than 1931-32 but the value was only 5 percent greater. In 1932-33 exports were valued at \$4,100,000 as against \$3,900,000 in 1931-32 and the 5-year average of over \$4,600,000.

The volume of dried and canned apple and pear exports in 1932-33 was well maintained but export values declined. Exports of dried apples amounted to 18,300 short tons valued at \$2,300,000. This compares with exports of 15,800 tons in 1931-32 which had a value of \$2,446,000. Exports of canned apples and apple sauce amounted to 359,000 50-pound cases which was above the quantity shipped last season. Exports were valued at \$686,000 or below 1931-32. Dried pear exports were slightly larger than last year reaching 3,100 short tons. They had a value, however, of only \$386,000 or lower than in any of the past four seasons. The canned pear exports of 1,200,000 50-pound cases were only slightly below average but the value of \$3,830,000 was much below that of any of the last seven seasons.

Although a difficult season for exporters, American fresh, dried and canned apples and pears held their place in foreign markets. The popularity of these products was fully maintained.

APPLES

The General Market Situation

The exportation of fresh apples from the United States has become increasingly difficult not only because of poor demand conditions but because of a multitude of restrictions which have been placed upon international trade during the past few years. The unsettled state of the world currencies has also been a very disturbing factor. Most serious to the apple trade has been the combined effect of the duty levied on apples in the United Kingdom and the heavy depreciation in sterling. Barriers have been raised which have drastically curtailed apple exports to Argentina, Denmark, Canada, France and Norway. (See table, page 35). In Germany, the Netherlands, Belgium and Sweden exports have not been seriously affected but this volume has been maintained at price levels which represent low returns to American growers.

The 1932-33 season opened up with a general feeling of uneasiness. American exporters who visited the European markets for the purpose of establishing connections and surveying market possibilities were for the most part rather discouraged. From the supply side the outlook for export was excellent. Apple crops were small both in the United States and with a few exceptions, in Europe. In addition, quality in European apples did not promise to be very good. Demand conditions, however, were poor. Purchasing power in most countries was considerably reduced. Unemployment among the working classes promised no significant reduction. In addition to the unsatisfactory demand, trading was rendered very precarious by the fluctuating exchange and the threat of added restrictions. The uncertainty of the final import duty that would be adopted as a result of the Ottawa Conference did much to retard business during the early months. The French quota regulations also added to the confusion.

The failure of the apple interests of the Pacific Northwest, for legal reasons, to restrict the movement of C grade apples had a depressing effect on the apple market. This was because European apple importers, as a whole, favored the restriction of the lower grades of apples in 1932-33 and also because the market lost strength as a result of the court's decision to permit the packing of C grade apples. Several operators who purchased early at opening prices were later forced to sell in competition with those who purchased later at the lower price level.

Another factor which helped to weaken the market was that the 1932 Australasian apple season had just finished disastrously. During the season (April to August) 5,225,000 boxes were shipped, of which 40 per cent arrived in the month of June. During the period of the glut, prices dropped to extremely low levels and the losses incurred by many operators who had made guaranteed advances were heavy. From an approximate price of 10/- (\$1.82) in early June, prices during the month dropped to 5/- (\$0.91) and less, depending upon grade, condition and variety. Good Sturmers averaged 5/- to 7/- (\$0.91 to \$1.28) while other varieties were difficult to move at from 3/- to 5/- (\$0.55 to \$0.91). The Australasian deal, according to reports, cost importers about 8/6 (\$1.55) per box c.i.f. when purchased outright or around 6/6 (\$1.18) on a guaranteed advance.

The result of the unfavorable demand situation brought about by the low purchasing power of the consumers and aggravated by the fluctuating and low exchange rates and the multiplicity of restrictions proved to be more than sufficient to counteract the price-strengthening effect of the short supply situation.

Early arrivals of apples such as boxed Gravensteins and barreled Wealthys and Maiden Blush sold at high prices in sterling and at fairly satisfactory prices in dollars. Gravensteins realized 11/0 to 13/0 shillings, or \$1.91 to \$2.26. Wealthys made about 40/0 (\$6.94) and Maiden Blush 33/0 to 34/0 (\$5.73 to \$5.90). As the season advanced prices for all varieties dropped somewhat in sterling but the returns converted to dollars declined much faster because of the heavy recession in the exchange rate. The result was that net prices in dollars were very low. The steadily receding dollar returns for apples sold on the British market resulted in a fall in the selling price for apples in the Netherlands, Belgium and Germany as well.

The Price Situation a/

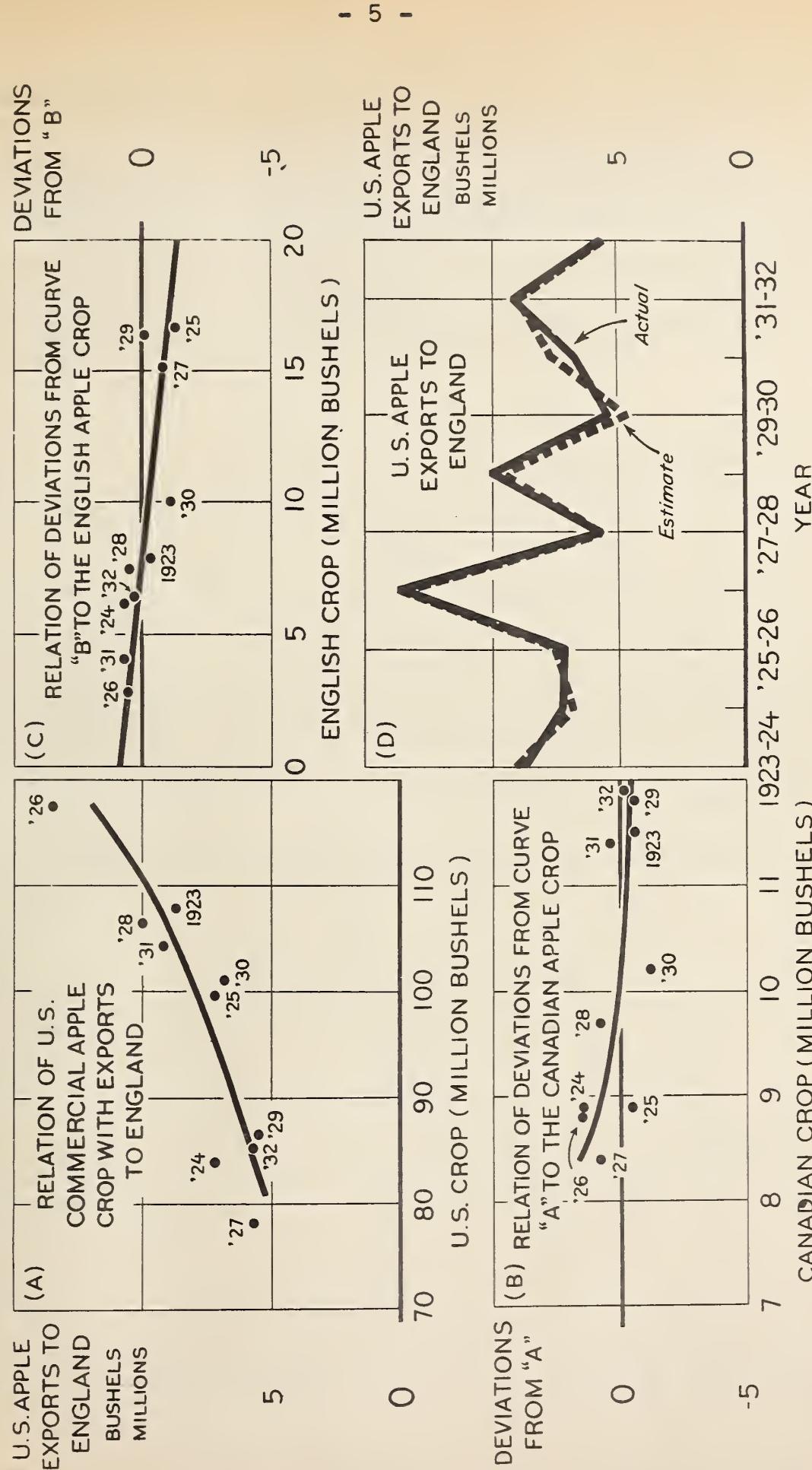
Net prices for American apples were lower in the 1932-33 season in the United Kingdom than in any recent year. Barreled apples sold at higher prices in sterling than last year whereas boxed apples ruled at somewhat lower levels. When converted to dollars, less duty, the prices received for both deals were the lowest on record. Comparative prices for former years are given in the tables on pages

The price paid in England for apples over a short period of time such as one sale or for a week, or probably in some cases for a little longer period, is for the most part explained by the demand for apples in England. That is, prices vary considerably from week to week during a season. At the start and finish of a season prices are much higher than during the season proper. Then from time to time market gluts or scarcities occur and prices vary considerably from the ruling prices. Such variations are mainly explained by the demand conditions prevailing at the time in question.

For a season or over a period of years the price paid for American apples in England is determined largely by the supply of United States apples on the British markets. The quantity of United States apples shipped from the United States to England from season to season depends, for the most part, on the size of the United States apple crop. The size of the competing Canadian and English crops do not seem to have had any great influence on the amount of United States apples exported. The close relationship of apple exports to the United States commercial apple crop and to the two competing crops during the 10-year period, 1923-24 to 1932-33, is brought out in chart I, page 5.

a/ Based in part on the fruit section of "World Trade Barriers in Relation to American Agriculture" (Senate Document No. 70, 73rd Congress, 1st session), which was prepared by Gustave Burmeister and A.C. Edwards.

I. RELATION OF THE U.S. COMMERCIAL APPLE PRODUCTION AND COMPETING SUPPLIES ON EXPORTS OF U.S. APPLES TO ENGLAND

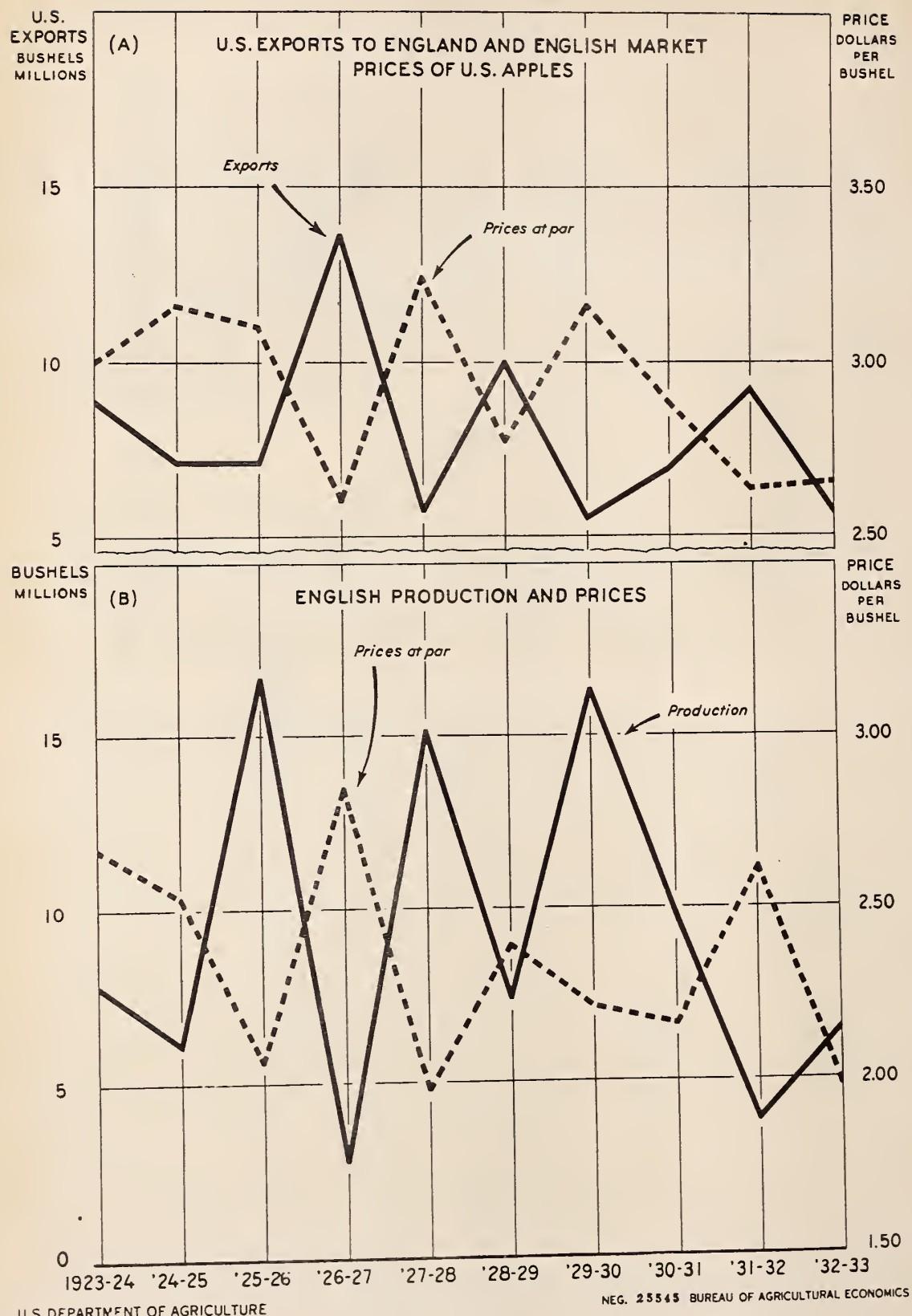


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U.S. APPLE EXPORTS TO ENGLAND DEPEND MAINLY ON THE SIZE OF THE U.S. COMMERCIAL APPLE CROP. THE SIZE OF THE CANADIAN AND ENGLISH CROPS ALSO HAVE SOME EFFECT ON THE VOLUME OF EXPORTS.

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II. APPLE PRICES AND SUPPLIES IN ENGLAND



PRICES OF U.S. APPLES IN ENGLAND VARIED INVERSELY WITH THE EXPORTS TO THAT COUNTRY AND PRICES OF ENGLISH APPLES VARIED INVERSELY WITH THE SIZE OF THE ENGLISH CROP. PRICES FOR U.S. AND ENGLISH APPLES FOLLOWED INDEPENDENT COURSES.

The quantity of apples shipped from the United States to England depends not only on the size of the United States commercial apple crop, but more particularly on the quantity of export apples available, or the small to medium-sized apples. These are preferred in England and, for that matter, in most export markets. The quantity of these exportable sizes varies, more or less, directly with the size of the apple crop. (See chart V (B), page 11). Imports of apples by countries into the United Kingdom are available only for the last few seasons so that the exports of apples from the United States to the United Kingdom must be used to indicate the amount of United States apples available on the British markets.

Variations in the seasonal average price paid for American apples in England in the 10-year period, 1923-24 to 1932-33, can be largely explained by the quantity of apples exported from the United States to England together with the British price level. Of the two factors the exports are by far the most important. Other factors, such as the size of the Canadian and British crops also have some effect on the price but to a much smaller extent. In Chart II (A), page 6, the close relationship of the price of United States apples in England to the United States apple exports (used as an index to the size of United States export apple crop) is clearly brought out. The effect of both the exports and the British commodity price level on American apple prices is shown in chart III, page 9. When exports to the United Kingdom have been large, reflecting a heavy apple crop in the United States, prices of American apples in the United Kingdom have been low; and when exports have been small, because of a short crop, prices have been high. The short barreled apple crop and the fairly large boxed apple crop in the United States in 1932 explains why barreled apples sold at higher prices and boxes at lower prices, in terms of sterling, during the 1932-33 season than in the preceding season.

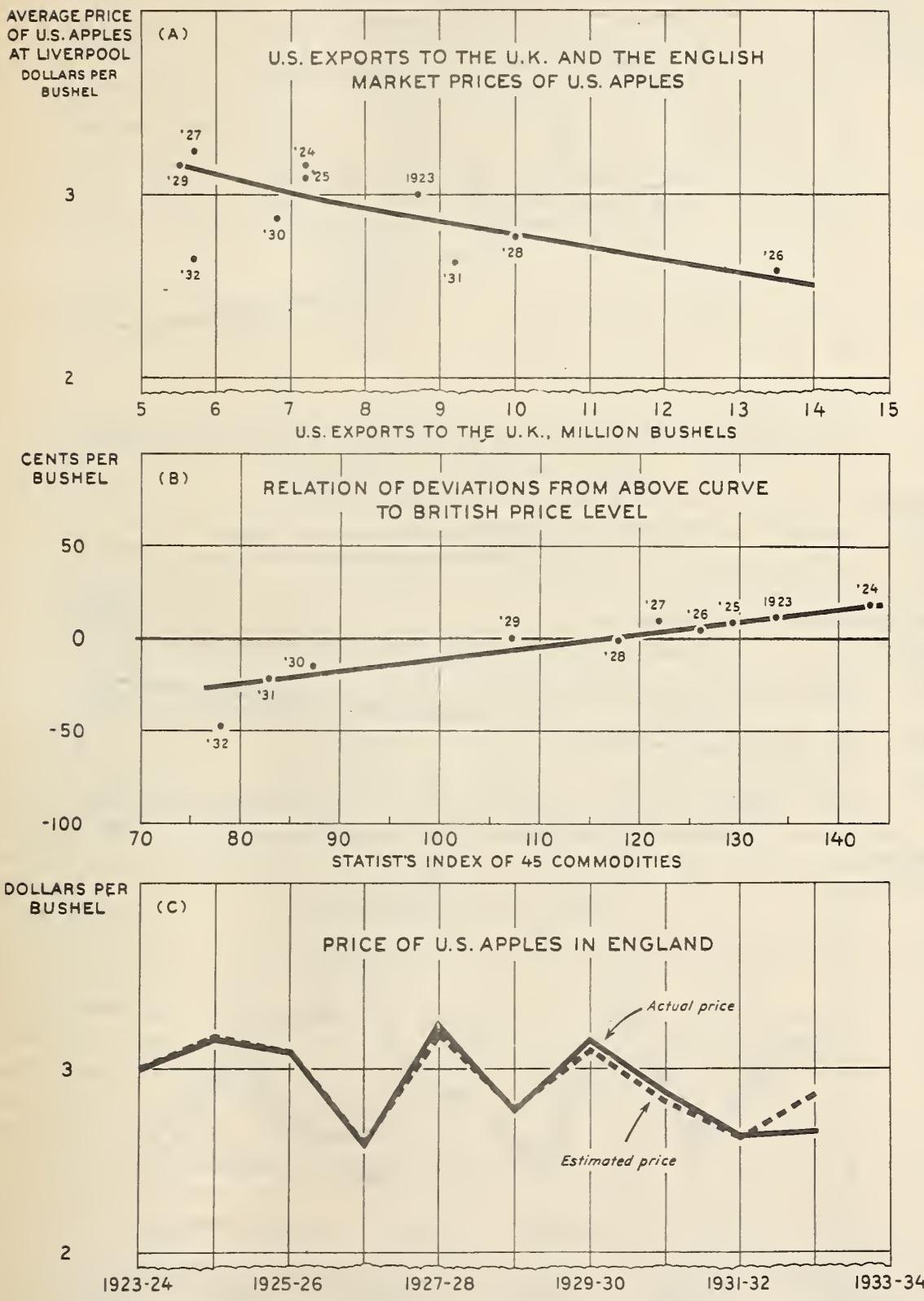
The price of British apples in the decade under survey appears to have been mainly determined by the size of the apple crop in the United Kingdom and the general commodity price level in that country. Chart II (B) page 6, illustrates the effect of the crop alone on price. The relationship of both crop and price level are shown in chart IV, page 10. The crop is by far the most important factor of the two. Imported apples do not appear to have affected the price for British apples to any great extent. In fact the prices of British apples appear to have been determined independently of competing supplies since they have been high in price when American apples were low and low when American apples were high. This is because, by coincidence or otherwise, the English apple crop has been large when the United States crop was small and vice versa. The prices paid in the United Kingdom for English apples and for United States apples are plotted together in chart V (A), page 11, to show the opposite fluctuation in price. Chart V (B) illustrates the indirect relationship between the two crops and the direct relationship between the United States apple crop and exports to the United Kingdom.

The downward trend in the prices paid in the United Kingdom in terms of sterling, for both United States and English apples is accounted for by the drop in the general price level in the United Kingdom. In the 10-year period, 1923-24 to 1932-33, the Statist's index of 45 commodities, which was used in these studies, declined at the rate of about 5 per cent a year, or 50 per cent during the decade. Prices paid for English apples receded at the rate of 1 per cent a year or 10 per cent in the period under survey. The decline in the price paid in England for United States apples was slightly less than 1 per cent a year or 9 per cent for the decade. The drop in apple prices in the United Kingdom has not been as great as the index because of the sharp increase in the demand for fruit in the diet of the British people.

Although the sterling price for American apples has dropped only 9 per cent in the 10-year period, 1923-24 to 1932-33, the price to American growers in dollars has shrunk a great deal more, particularly in the last two seasons or since the depreciation in sterling and the adoption of the British duty on foreign apples. The decline in price to American growers in terms of dollars since the 1930-31 season has been about 53.5 per cent. The prices which prevailed in England in terms of sterling for United States boxed and barreled apples are graphically portrayed in chart VI (A), page 12, and in chart VI (B), the same prices in dollars, but reduced to a New York basis are shown. It can be seen that in terms of sterling there has been little decline in prices but when the same prices are converted to United States currency the great shrinkage in prices to American growers in the last two seasons is clearly indicated.

It was pointed out earlier in this report that British apple prices appeared to have been determined mainly by the size of the British apple crop. A further indication that the price is little affected by competing supplies is the high prices received for homegrown apples in the United Kingdom as compared with prices paid for American apples. A table giving the seasonal average price for the chief varieties of British apples in the 10-year period 1923-24 to 1932-33, is given on page 45. The average price paid for the chief English dessert and cooking apples in the decade under survey was \$3.04 per bushel compared with \$3.46 a bushel for American boxed apples (dessert) and \$2.37 a bushel for American barreled apples (dessert and cooking), all converted at par of exchange. Strictly dessert apples produced in England, such as Cox's Orange Pippin and Worcester Pearmain, sell at substantially higher prices than the dessert apples from the United States of comparable grade and quality. In other words the British consumer seems willing to pay a higher price for British apples than for imported apples. This would indicate that apples from the two sources are not greatly interchangeable as far as the preferences of the British consumer are concerned.

III. RELATION OF U.S. EXPORTS OF APPLES AND THE BRITISH PRICE LEVEL TO THE PRICE OF U.S. APPLES IN ENGLAND

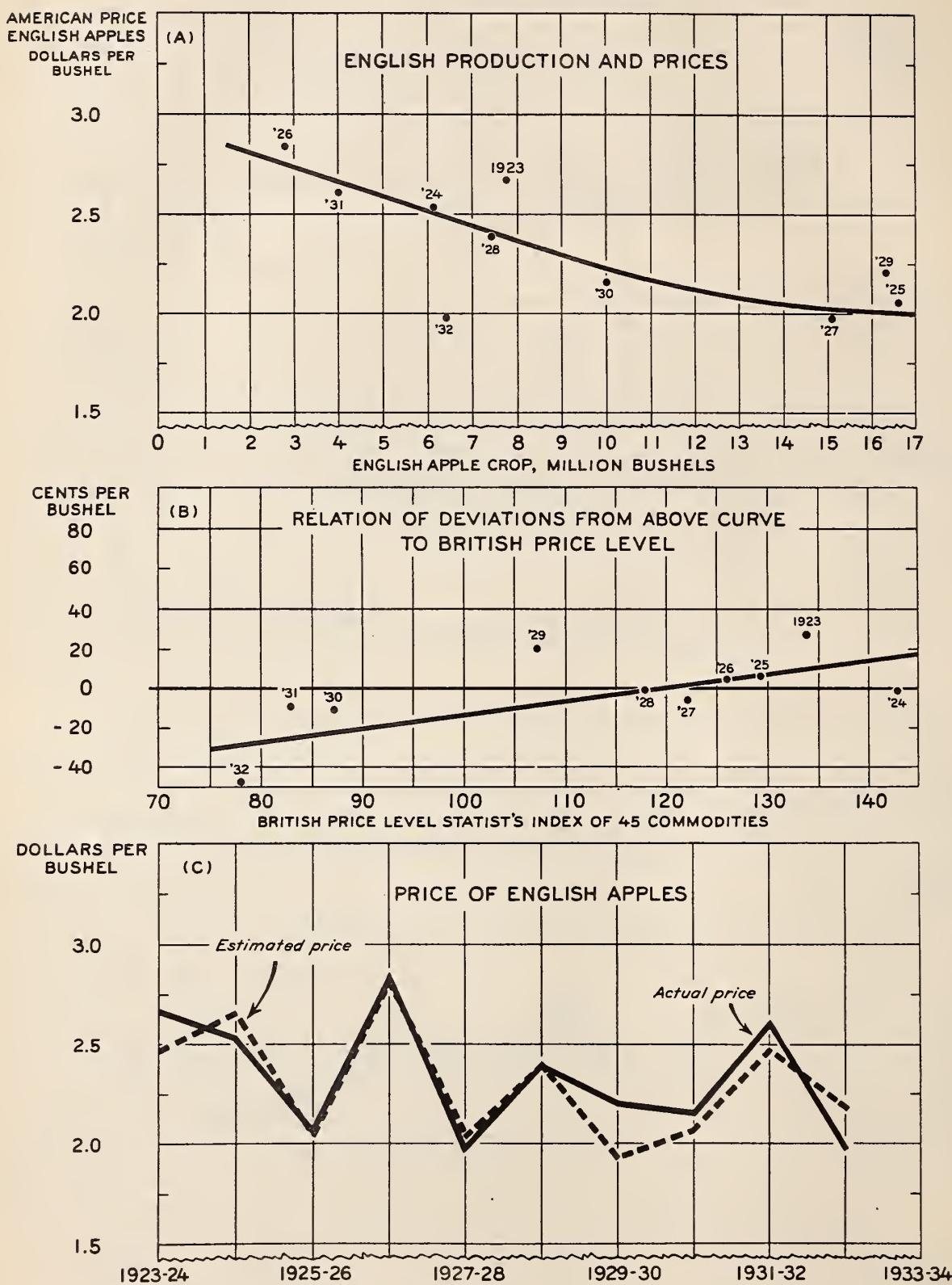


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THE QUANTITY OF U.S. APPLES EXPORTED TO ENGLAND AND THE
BRITISH PRICE LEVEL EXPLAIN MOST OF THE CHANGES IN PRICES
PAID FOR U.S. APPLES IN ENGLAND.

IV. RELATION OF SUPPLY AND THE PRICE LEVEL TO THE PRICE OF ENGLISH APPLES

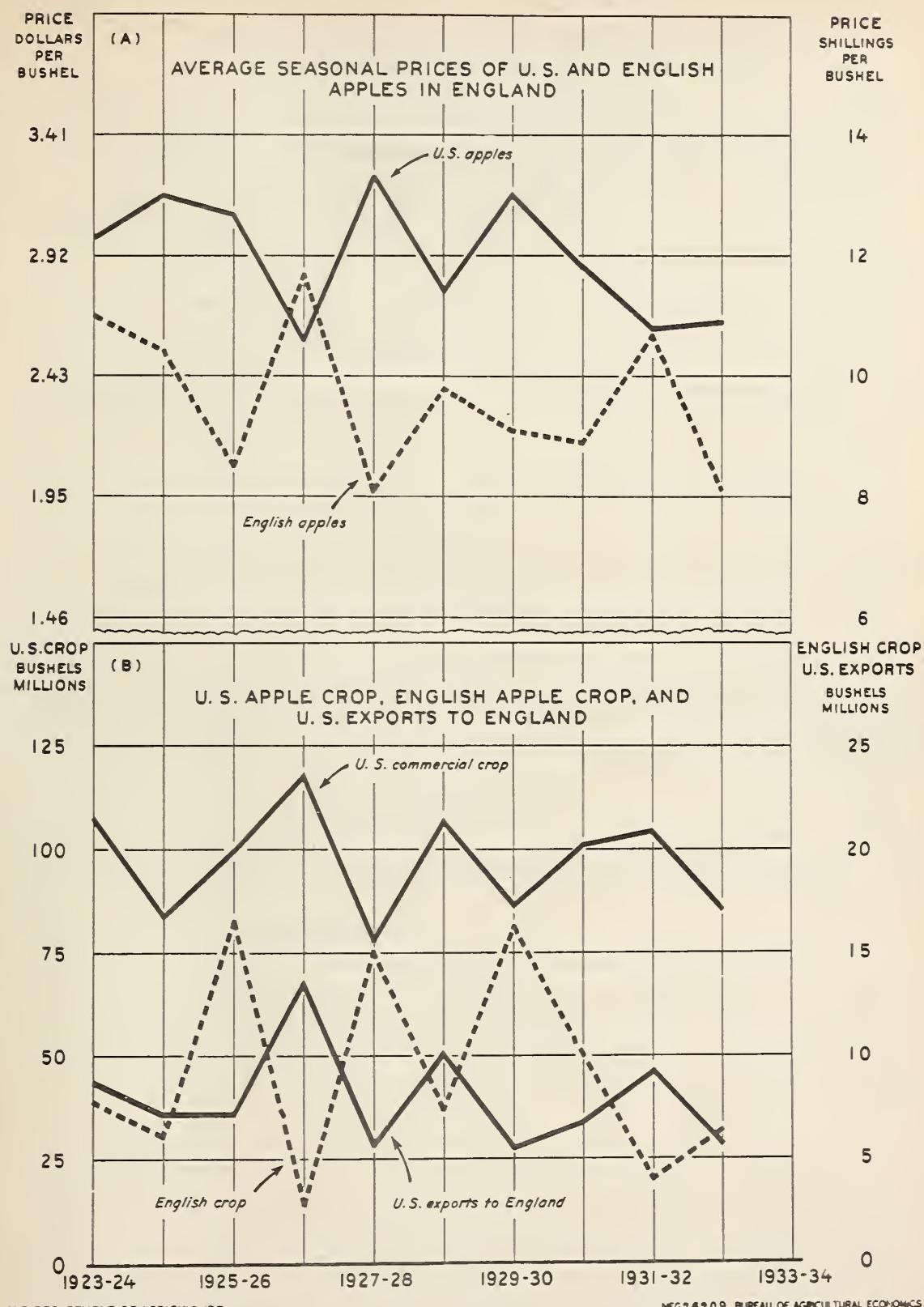


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THE SIZE OF THE ENGLISH CROP AND THE BRITISH PRICE LEVEL
EXPLAIN MOST OF THE CHANGES IN THE PRICES PAID FOR ENGLISH
APPLES.

V. APPLE PRODUCTION IN THE U.S. AND ENGLAND, EXPORTS TO ENGLAND, AND APPLE PRICES IN ENGLAND

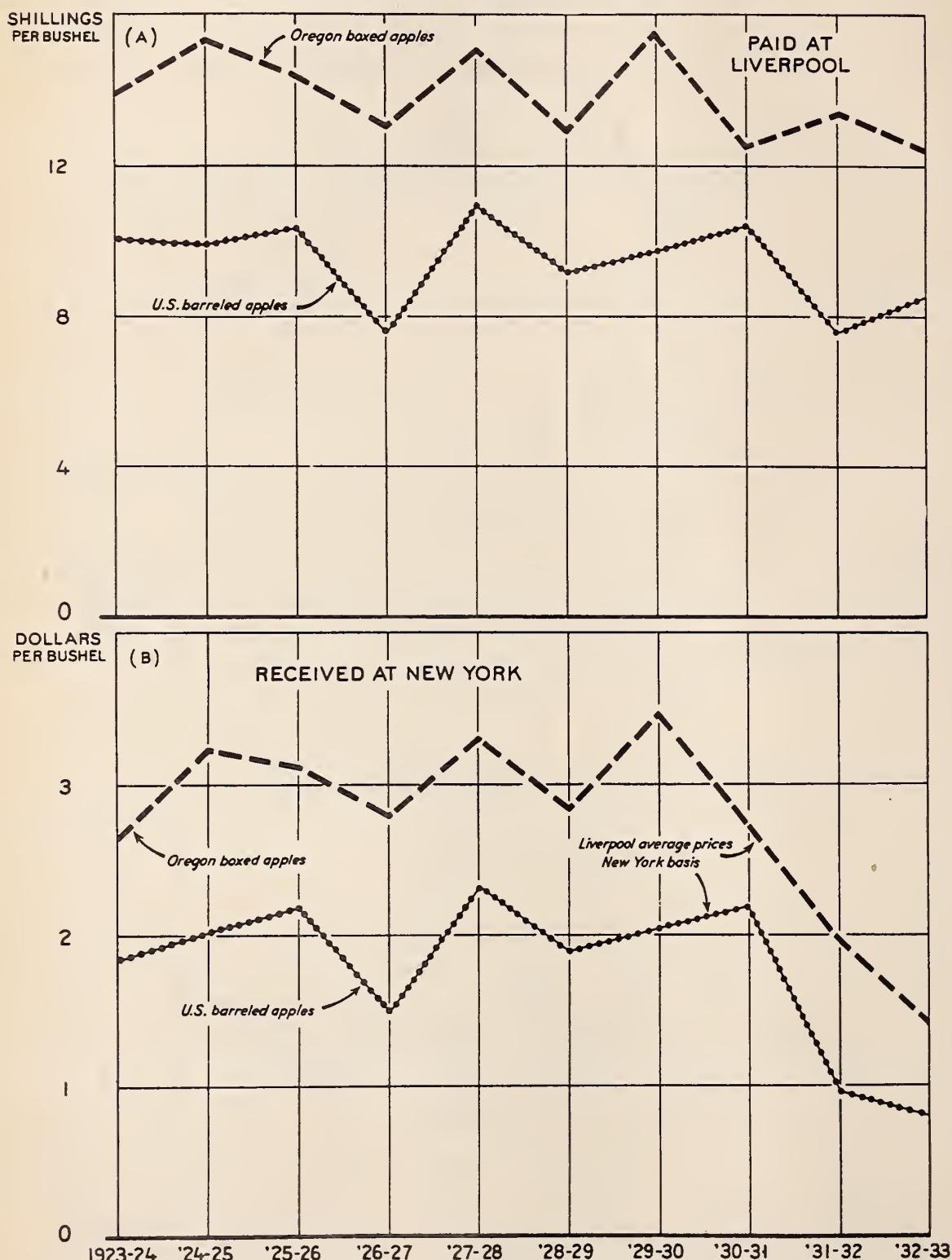


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NEC 26209 BUREAU OF AGRICULTURAL ECONOMICS

PRICES PAID FOR U.S. AND ENGLISH APPLES IN ENGLAND HAVE GENERALLY FLUCTUATED IN OPPOSITE DIRECTIONS. THE ENGLISH APPLE CROP FOR THE MOST PART HAS BEEN LARGE WHEN THE U. S. APPLE CROP WAS SMALL AND VICE VERSA. U.S. APPLE EXPORTS TO ENGLAND VARY DIRECTLY WITH THE SIZE OF THE U.S. CROP.

VI. PRICES PAID AT LIVERPOOL FOR U.S. APPLES AND THE EQUIVALENT RECEIVED AT NEW YORK BY AMERICAN GROWERS,
SEASON AVERAGE, 1923-24-1932-33



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STERLING PRICES PAID FOR U.S. APPLES IN ENGLAND SHOW ONLY A SLIGHT DOWNWARD TREND. HOWEVER, WHEN CONVERTED TO A NEW YORK BASIS IN DOLLARS, PRICES EXHIBIT A STRIKING DECLINE OVER THE LAST TWO SEASONS.

In the 4-year period, 1927-28 to 1930-31, there was rather a distinct spread between the prices, in the currency of the respective country, for United States and for Canadian and English apples. During these years the currencies of the United Kingdom, Canada, and the United States were all on a gold basis, and apples were allowed to enter the United Kingdom duty free. In September, 1931, Great Britain went off the gold standard and in 1932 adopted a duty on foreign apples. Since that time, or in the 1931-32 and 1932-33 seasons, there has been a decided shift in the relationship between the prices in local currencies received by British, Canadian, and American growers for apples sold on the British markets. This spread in prices to which reference has been made has narrowed or disappeared. The explanation is found in the exchange rate, or depreciation in the currencies in England and Canada. Sterling averaged about 24 per cent below par in the 1931-32 season (September-April) and 30 per cent below par in the 1932-33 apple season. Canada went off the gold standard in October 1931 and since that time Canadian money has been below par but not as much as sterling. Depreciated currency as well as the duty-free character of the fruit has given Canadian apple growers considerable competitive advantage over the American grower.

It is impossible to determine the full effect of the depreciation in sterling and the British duty on apples of approximately 2/3 cents a pound on the prices received by American growers for their apples but as indicated the return to the American grower in American currency has shrunk much more than that received by the British or Canadian grower in English and Canadian currency respectively. There was no marked increase in the sterling price paid in the United Kingdom for American apples in 1931 after the decline in the gold value of sterling nor was there any appreciable increase in prices to offset the duty imposed in 1932. There has, however, been little decline in sterling prices for apples. Had the pound remained at par there would probably have been a more substantial decline in sterling prices in the last two years than has occurred.

On the other hand, the decline in sterling reduced the British buying power for apples imported from gold standard countries and consequently the import demand for American apples. This simply meant that lower prices had to be accepted by American shippers for the same quantity of apple exports, or if the same price level in gold was to prevail a smaller quantity could be exported. The exports indicate that the latter course was followed.

Prices paid for Canadian and for British apples in the 1932-33 season were lower, on the whole, than in 1931-32. This is explained by the larger crops in both countries during 1932 than in 1931. Early in the season attractive prices were paid by speculators to Canadian growers, particularly for boxed apples, because the fruit was not affected by the British duty and because of the exchange situation. The selling prices of the apples in the United Kingdom, however, proved to be lower than had been anticipated and some buyers lost heavily. For example, in November,

1932, British Columbia apples sold at \$1.10 to \$1.25 (gold) per box for all varieties, f.o.b. shipping districts whereas Washington apples ruled at from \$0.75 to \$0.90 a box. In former years there was little or no difference between prices paid for comparable packs. Reports indicate that roughly one third of the British Columbia export pack of about 2,000 cars was sold on this basis. After November, forward purchases were fewer, and much of the fruit shipped from British Columbia was sold on a consignment basis. Returns were much less, often below \$0.65 a box, or little if any more than the Washington growers received for f.o.b. sales but probably above that of many consignments from Washington.

I. APPLES: Average price of English apples and United States apples, United States exports to England and the Statist's index of 45 commodities, 1923-24 to 1932-33

| Year | Average price a/ | | United States: exports to England | Statist's index d/ |
|--------------|--------------------|-------------------------|-----------------------------------|--------------------|
| | English apples b/ | United States apples c/ | | |
| | Dollars per bushel | Dollars per bushel | | |
| 1923-24..... | 2.67 | 3.00 | 8.7 | 133.9 |
| 1924-25..... | 2.53 | 3.16 | 7.2 | 143.3 |
| 1925-26..... | 2.06 | 3.09 | 7.2 | 129.4 |
| 1926-27..... | 2.84 | 2.58 | 13.5 | 126.0 |
| 1927-28..... | 1.98 | 3.24 | 5.7 | 122.0 |
| 1928-29..... | 2.39 | 2.77 | 10.0 | 117.9 |
| 1929-30..... | 2.21 | 3.16 | 5.5 | 107.1 |
| 1930-31..... | 2.16 | 2.87 | 6.8 | 87.2 |
| 1931-32..... | 2.61 | 2.63 | 9.2 | 82.9 |
| 1932-33..... | 1.98 | 2.65 | 5.7 | 78.0 |
| | : | : | : | : |

Compiled by the Foreign Agricultural Service from official sources.

a/ At par of exchange.

b/ Excludes Cox's Orange.

c/ Average of barreled and boxed apples.

d/ September - April.

Volume and Distribution of United States Apple Exports

Exports of apples in the 1932-33 season totalled approximately 13,800,000 bushels compared with 17,900,000 bushels in 1931-32 and the five-year average, 1927-28 to 1931-32 of 15,800,000 bushels. Exports of both boxed and barreled apples were below the average of the past 5 years, particularly barrels. This decline is accounted for by the smaller United States apple crops in 1932, the poor export demand and trade barriers. Shipments in baskets were somewhat larger than those of last year. About 8,500,000 boxes, 1,650,000 barrels, and 290,000 baskets were exported in 1932-33 compared with 9,500,000 boxes, 2,300,000 barrels, and 164,000 baskets in 1931-32. The exports are given in greater detail on pages 39 to 43.

Exports amounted to approximately 16.2 per cent of the commercial apple crop as compared with 17.2 per cent last year, and the 5-year average, 1927-28 to 1931-32, of 16.6 per cent. It can be seen from these figures that exports were about normal for the size of the crop but, judging from difficulties that were encountered this season, in disposing of export apples, exports might not have been much larger even with a larger crop. Exports of boxed apples were equal to 21.9 per cent of the commercial boxed crop as against 24.2 per cent in 1931-32 and 20.3 per cent in the 5 years under survey. The proportion of the barreled apples exported was considerably below average reaching only 11.9 per cent compared with 13.0 per cent last season and 13.3 per cent in the 5-year period, 1927-28 to 1931-32.

While exports from the United States were the smallest in the last 5 seasons those from Canada were of record proportions or roughly 5,600,000 bushels. This was about 47 per cent of the commercial crop. Exports of boxed apples were by far the largest ever to clear from Canada exceeding 2,000,000 boxes, or over 40 per cent of the British Columbia crop. Around 1,200,000 barrels were exported from the eastern Provinces or approximately one-half of the crop. Earlier in the season, because of windstorm damage in Nova Scotia, it did not appear that barreled exports would be as large as actual shipments, but contrary to expectations, a large proportion of the windfalls were shipped. This brought total barreled exports almost up to average. (See table IV, page 39).

United States apple exports in all containers to Europe during the 1932-33 season amounted to approximately 13,800,000 bushels or 93.5 per cent of the total movement. This compares with 16,700,000 bushels in 1931-32, or 93.4 per cent of the exports and with an average of 14,200,000 bushels in the 5-year period, 1926-27 to 1930-31, or 86.0 per cent. It will be noted that the proportion of the exports sent to Europe has increased in the last few years. There was a definite shift in the European distribution. Exports to the United Kingdom made up only 41 per cent of the total whereas fully one-half of the exports usually go to that country. France also took fewer apples than in recent years. The decline in the

exports to England and France was largely due to trade restrictions in force in those countries. Increased shipments to Germany and the Netherlands compensated for the decline in the exports to the two countries mentioned. For more detailed information see table VIII on page 43.

Exports to countries outside of Europe totaled around 900,000 bushels or 7 per cent of the export movement. Last season exports to these countries were 1,200,000 bushels and in the 5-year period, 1926-27 to 1930-31, they averaged 2,300,000 bushels. The decline is accounted for by trade restrictions and poor purchasing power. Declines have been particularly heavy in the exports to Argentina and Canada.

The larger export of apples to the Continent this season can be for the most part explained by the small European apple crops in 1932 although the poor market afforded American apples in the United Kingdom was also a factor. In the 1931-32 season fairly good crops were harvested in continental European countries and the exports from the United States were small. Normally exports of American apples to the Continent vary indirectly with the size of the apple crops in the chief consuming countries such as Germany, the Netherlands, France, Belgium and the Scandinavian countries. A large crop in exporting countries such as Switzerland, Austria, Czechoslovakia, and Italy is also an important factor.

New York City retained first place as a port of export for apples although the quantity shipped through New York was much smaller than usual. Exports from the chief ports were as follows: New York 5,564,000 bushels, Seattle 4,042,000 bushels, Portland 1,973,000 bushels, San Francisco 852,000 bushels, Baltimore 768,000 bushels and all others 406,000 bushels. Exports via Atlantic ports were less than last year because of the short barreled crop. For further detail on exports of apples by containers and ports, see table IX, page 44.

Boxes: Exports of apples in boxes exceeded 8,500,000, or slightly below the 5-year average but considerably short of the 9,300,000 boxes exported in 1931-32. About 2,430,000 boxes were shipped to the United Kingdom compared with 3,400,000 in 1931-32 and an average of 3,550,000 boxes in the 5-year period, under survey. Not only was the total smaller than in any of the past 7 years but the proportion of the exports was smaller amounting to only 28.7 per cent. This is the first time since boxed apples started to move out of the United States in volume that the United Kingdom has failed to take less than 30 per cent of the boxed exports. With the exception of the United Kingdom, exports to other European countries were well maintained. Germany, the Netherlands, Belgium and Poland all took larger quantities than in 1931-32. Shipments to France and the Scandinavian countries declined somewhat.

Exports to other than European countries were approximately 750,000 boxes as against 1,000,000 boxes in 1931-32 and 1,600,000 boxes in the 5-year period, 1926-27 to 1930-31. Exports have continued to decline largely because of the shrinkage in the exports to Canada and Argentina,

the most important outlets. However, the only non-European markets of importance to take more boxed apples than in 1931-32 were Mexico and Egypt. In all other cases there was a decline. (See table V, page 40).

Barrels: About 1,650,000 barrels of apples were exported from the United States in the 1932-33 season compared with 2,900,000 barrels in 1931-32 and 2,600,000 barrels in the 5-year period, 1926-27 to 1930-31. European countries imported 1,600,000 barrels as against 2,800,000 barrels last season. The proportion of the trade going to Europe was about the same as last year or around 97 per cent. Shipments to all European countries with the exception of Germany and Poland were below those of last year. The United Kingdom absorbed around 1,000,000 barrels or just a little over one-half the quantity consumed in 1931-32. Table VI on page 41 gives the exports in greater detail.

Exports of barreled apples to Canada and Latin American countries continued to decline and reached only 42,000 as compared to 58,000 last year and to the 5-year average, 1926-27 to 1930-31, of over 200,000 barrels. There was some recovery in the exports of barrels to Argentina as contrasted with the lean 1931-32 season but the total of 24,000 barrels was far below the tariff-free years. Exports to Canada declined to a mere trickle. The decline is accounted for by the large Canadian crop, poor business conditions, and the higher tariff.

Baskets: Exports in bushel baskets registered an increase over 1931-32 amounting to over 283,000 as against 164,000 in the former year. Total shipments to Europe were 250,000 baskets. Of this total 88,000 went to the United Kingdom, 63,000 to Belgium, 51,000 to Germany, 32,000 to France, 12,000 to the Netherlands, and 4,000 to Sweden. About 34,000 baskets or most of the remainder was shipped to Canada. (See table VII, page 42).

Comments on Boxed Apples

Gravensteins and Jonathans met with a good inquiry in August and September but took a slump toward the end of October. From that time until after the turn of the new year boxed varieties were difficult to move at anything like satisfactory prices. Quantities during the early part of the season were never excessive but irrespective of supplies the movement was slow. The quality of the fruit was good and arrivals for the most part were in good condition.

Trade during the first part of December was very dull. The markets which are usually very busy in anticipation of the Christmas trade showed but little animation. The orange market developed considerable strength but apples were particularly slow. The traditional "dead spot" which characterizes European markets during the Christmas holiday season occurred as usual. Perhaps because Christmas fell at

the end of the week there was little or no buying a week or ten days ahead. However, a few days before Christmas the market prospects improved, but prices were disappointing, despite limited offerings. There was very little barreled fruit on hand to compete with boxes, with the exception of Nova Scotians, therefore the weak demand and low prices proved an added disappointment.

It is interesting to note that boxed apples are usually in demand during the Christmas season since it is customary on the part of certain firms to send out boxes of apples for gifts. Newtowns in particular are used as gift packages. Red apples for some reason are not as popular in England at Christmas. This is quite the opposite from the Continent where an active demand exists for small highly colored fruit. In the Scandinavian countries in particular, small, red apples are used in decorating the Christmas tree.

After the holidays, trade in the United Kingdom began to show a noticeable improvement. An advance of from 1/6 to 2/- (\$0.27 to \$0.36) per box was recorded. During March supplies were somewhat in excess of demand and importers withdrew from the auctions large quantities at each sale. Since the condition of supplies was good, importers were not forced to sell and were able to move out small quantities as the market justified.

The deal for the remainder of the season held quite steady, except toward the last when a more active demand developed. Newtowns despite Australasian supplies were wanted. The condition of the fruit was outstanding, many importers stating that they had never seen it better. It can be said that the season came to a fairly satisfactory close. Prices were not maintained at such high levels as to restrict trading and the general quality and condition of the fruit was such that a steady demand was maintained.

The short German apple crop made it possible for that market to absorb much larger quantities of apples than in the preceding year. Prices were low and it was difficult to get much more than cost out of the fruit. The Hamburg market was particularly discouraging during the Christmas holiday season. It was thought that interest would pick up after the holidays since no sales had been held since the 15th of December. Stocks in the hands of wholesalers and retailers failed to clear according to expectation, with the result that there was no interest in fresh supplies. While certain districts in Germany reported a fair holiday trade, many sections reported a very limited sale. Large supplies and continuous arrivals from neighboring countries sold at low prices and although they were not of comparable quality with American apples, they offered severe competition.

It was anticipated that this competition would cease to a large extent by the middle of January but because of low prices, large quantities were stored with the hope of securing better prices as the season advanced. The large export surplus in Italy and Austria caused considerable concern to brokers on the German market who were operating in American supplies. Therefore, large stocks of American supplies were placed in cold storage

until after January. The increased duty on bulk apples effective as of January 1 from Reichsmarks 2 (\$0.48) to Reichsmarks 4.50 (\$1.07) per 100 kilos had the effect of curtailing supplies and allowed dealers to begin a clearance of their holdings.

Owing to the shortage of good barreled stock during the second half of the season boxed apples met with a steady enquiry. Now and then one experienced a "sticky" spot but supplies as a whole were kept fairly well within requirements and values held fairly steady. After the new tariff schedule came into operation, importers were better able to anticipate the future with at least some degree of certainty. Winesaps and Newtowns predominated throughout the greater part of the season with lesser quantities of Rome's, Jonathans, Delicious, Arkansas Blacks, Orteleys and Winter Bananas.

Prices on the Rotterdam market were disappointing throughout the season. Large quantities were usually available and frequently the condition was unsatisfactory. Number three grade fruit was in quite liberal supply at all times, the grade of which was frequently or much lower standard than the established "C" grade pack. Low guaranteed advances were reported to be responsible for a large part of the market difficulties. Fruit carried under a low guarantee was frequently placed in competition with fruit purchased outright and a price level established with which the latter could not compete. The Rotterdam market was for the most part characterized by the absence of foreign buyers. Because of the various restrictions existing in neighboring countries buyers representing these latter countries were not active in Rotterdam.

Comparatively small quantities of boxed apples were available on the Danish markets. The offerings which were available were purchased or shipped through English brokers. Sales were infrequent and irregular, in fact to such a degree that current market reporting was rendered impossible.

The situation in Belgium showed little change over the previous years. Quantities of low grade fruit had a depressing effect upon general market levels. Condition factors frequently played an important part in the demand situation.

The first shipment of Gravensteins from California arrived during the first week of August when market conditions were favorable. A strong continental demand for Australian fruit developed just before the Gravensteins arrived. This resulted in a fairly good clean up of Australian fruit in the United Kingdom markets. Australian Sturmers advanced from 5/0 - 7/0 (\$0.87 - \$1.21) to 11/0 - 13/0 (\$1.90-\$2.26) and California Gravensteins received the latter prices. The first few cars of Gravensteins were short of color and consequently sold at less than well-colored fruit would have made. In this connection it is well to emphasize again the importance of color as a quality factor in the marketing of apples. The absence of bitter pit as compared with previous years is also worthy of

mention. This can perhaps be attributed to the delay which has taken place with regard to the time of harvesting. The agreement among producers and shippers of Gravensteins to delay harvesting until the fruit has reached a certain stage of maturity is apparently proving its worth. As far as the export market is concerned there is no point in harvesting varieties before their proper season. Seasonal apple famines no longer exist and as far as Europe is concerned, particularly in the United Kingdom, apples from some quarter of the globe are available the year around. Shipping immature stock only leaves a bad taste and what profits may have been made as a result of a few early cars are soon lost in subsequent shipments.

As the season advanced prices began to stiffen since supplies were somewhat short and the quality was improved. Gravensteins were better colored, hence in demand at higher prices. New Zealand apples taken out of cold storage also moved into consumption at just double what they would have made had they been placed on the market at the time of arrival.

The Jonathan is a favorite variety in Europe and when it arrives in good condition and of good bright color it is greatly appreciated. Boxed Jonathans arrived at the beginning of the season in good condition and made good values. The fruit was firm, well colored and of bright, clean appearance. As mentioned earlier, Jonathans slumped in price after the season got well under way.

Newtowns enjoyed a fairly good season. California shipments were sometimes disappointing but on the whole the fruit made a good impression. Offerings were much heavier in London than in Liverpool. The Californian pack varied considerably according to brand. Some marks arrived in excellent condition. The pack was tight, well crowned and of good finish. Early shipments arrived very green and with very poor eating quality. The question of shipping Newtowns so early is a debatable one. On the other hand, certain marks had a tendency to arrive slack and considerable bruising resulted where pads and liners were omitted.

The popularity of the Oregon Newtown has been well maintained. As a matter of fact, the season ended up in a rather spectacular manner. The condition of the fruit could not have been better and it seemed that as the season continued the general outturn of the fruit became better. Despite Australian and New Zealand competition Oregon Newtowns were very much in demand. British Columbia Newtowns were sometimes advertised by the retailer as being "British Columbia-Oregon Newtowns."

The Winesap seemed to possess superior eating quality to that of the previous season. At times the Winesap demand was very slow and offerings had to be withdrawn. The condition and general appearance was good and supplies on the English market were seldom heavy. The

Continent received more liberal supplies of this variety but for some reason or another the fruit showed considerable waste rather early in the season. Many boxes sold on the Rotterdam and Hamburg markets were loosely packed. Flat packs were frequently in evidence. The quality of No. 3 grade Winesaps provided no strength to those markets. Many members of the trade were formerly of the opinion that poor apples were never packed in boxes. They realized differently this season. The shipment of this class of stock is to be regretted. Some of the prestige which boxed apples have enjoyed in the past was lost.

Comments on Barreled Apples

The barreled apple deal can be split up into two parts, - that which went to the United Kingdom and that which was shipped to the Continent. As far as United Kingdom receipts were concerned the season was perhaps the most satisfactory of any experienced in recent years. Shipments from the beginning of the season until the end were generally satisfactory. Price levels remained fairly constant largely because of short supply and the generally good condition of the fruit. Values in terms of sterling were fully five shillings higher than the preceding season, and had exchange been more stable or on a parity basis the net returns to shippers would have been an altogether different story. Throughout the entire season American barreled apples met with a good inquiry, and, while Nova Scotians were often in difficulty, the American stock moved out at good rates.

Barreled apples seemed to have a definite upper limit beyond which price would not rise. Despite supply it was impossible to maintain prices in excess of the so-called popular price range. Whenever increased wholesale prices reflected themselves upon retail prices there was a great decline in consumption. In other words, the poor purchasing power of the consumer was plainly evident.

The first shipment of barreled apples arrived somewhat later than usual. This was a parcel of Williams Early Red which sold in Liverpool the second week in August at 34/0 (\$5.88). A few shipments of Transparents arrived at about the same time but were too small for best results. However, had the Transparents been shipped earlier results would have been disastrous. When there is a large crop of Australasian apples it does not pay to ship apples to arrive during late June or July. There are seasons when early apples may do well on the Liverpool or Glasgow markets but as a rule London is a poor outlet for varieties of this character.

The first big shipment of the season arrived in Liverpool on September 13 consisting of 37,500 barrels, over 30,000 of which originated in Canada. Gravensteins made up the bulk but there were fairly liberal offerings of Duchess, Wealthy, Duleys, Williams Red, and similar fall

varieties. While the Canadian fruit was full ripe, immature, soft and dull, American fruit landed in perfect condition. Varieties from the United States consisted largely of Jonathan, King David, Bonum, McIntosh, Northwestern Greenings, and a few Wealthys, Duchess, and Maiden Blush. While Nova Scotian met with very slow bidding American offerings were keenly bid for and realized up to 40/0 (\$6.92) as compared with 15/0 - (\$2.60) for competitive fruit.

Supplies from New York State and the New England States were in more liberal supply than in recent years. Some very nice parcels were observed throughout the season and the reputation which these districts held in the English market some years ago was to some extent regained. New England fruit during recent years has been disappointing, resulting in considerable loss to importers.

Fruit from Delaware frequently arrived in poor condition. In addition to being overripe, soft and somewhat wasty it was of only ordinary quality. Buyers frequently referred to it as being "tired" or looking like "old men". Delaware apples on the whole did not compare with certain neighboring states as regards quality, appearance, and pack. They lacked the life and flash for which buyers look.

The termination of the Importation of Raw Apples Order on November 15 had little effect upon the English markets. The quality of the fruit remained about the same after the order was lifted as it was before. Utilities, of course, were allowed to enter, but at no time was the quantity heavy.

The combination of unfavorable demand factors, such as adverse exchange rates, duties, embargoes, and poor purchasing power has, no doubt, checked the flow of low quality fruit to the United Kingdom. Present costs do not warrant the movement of an inferior product and as long as present transportation and selling charges remain, net results are likely to prove disastrous.

Canadian barreled apples which predominated on the British markets this season, were of low quality. Unfortunately much homegrown fruit was also of low quality. This heavy quantity of cheap fruit seriously depressed the market for sound stock. Although offerings from Ontario were decidedly superior to those of Nova Scotia their usual high standard was not always maintained. Nova Scotian apples sold at ruinously low levels. Low grade "domestics" and "windfalls" continued to arrive through the entire season. In fact, "windfalls" were sold as late as April.

Although American apples enjoyed a very substantial premium over Canadian apples, they, too, suffered lower prices in sympathy with the

market. It must be recognized that American apples subjected to heavy duty and adverse exchange rates as they were in 1932-33 required a premium of several shillings over Canadian fruit to return shippers the same net result.

In distinct contrast to the United Kingdom the Continent received some very poor shipments. Unclassified apples were available throughout most of the season and the general outturn of some of these parcels was very unsatisfactory. Many such lots were landed at Rotterdam and Antwerp, particularly at the former port. The apples in addition to being covered with scale and scab were frequently very watery. Likewise certain barrels marked as U.S. No. 1, but shipped without certificates, bore a close resemblance to the Unclassified pack described above. Many importers adopted the attitude that cheap apples were needed and it was the importer's duty to see that the public was supplied with an apple which they could purchase at a low price. In other words, the recommendation made early in the season, by the majority of the trade, that no unclassified fruit be shipped, was ignored.

The German market took comparatively few barreled apples. Boxed apples and bulk supplies from neighboring countries were in liberal supply most of the year and kept the trade fully occupied. Competitive supplies were very slow in clearing up, making it difficult to strengthen the position for barreled stock. Local supplies were cheap in price and since stocks in the hands of both importer and retailer moved into consumption rather slowly imported stock accumulated. Buyers could only keep ahead by selling old stock and taking a very narrow margin of profit. Supplies purchased one day frequently took several weeks to clear.

The York Imperial maintained its usual popularity. Shipments for the most part arrived in good condition and were generally sound, of good color, finish and appearance. Although quality from the southern end of the Shenandoah-Cumberland district was good the general appearance and outturn of those originating farther north were somewhat superior. Pennsylvania Yorks were especially good and held up well throughout the year. Utility Yorks were frequently as good as many parcels marked as U. S. No. 1, being well colored and of good appearance. The York finished the season remarkably free of scald. Fruit packed in shredded oiled paper gave almost complete control. Those packed without paper showed some scald but comparatively little as compared with previous years. The steady range in prices can be attributed to the generally satisfactory condition in which the fruit landed.

On the whole Albemarle Pippins were disappointing and the prices obtained were entirely commensurate with the quality of the fruit, since the quality, generally, was below average. Utility grade predominated. The fruit had poor color, was irregular in shape, and most parcels showed more or less waste. The London market took an unusual interest in the variety. Larger sizes could have been used.

Northwest Greenings shipped from the Shenandoah-Cumberland district occasioned considerable favorable comment. The fruit, in addition to having landed in splendid condition, was unusually clean and of high finish. Greenings, however, are not wanted during the holidays at any price and shipments should be held back so as to arrive during the last half of January.

An interesting feature to be noted this season was the increased popularity of the Grimes Golden. This variety heretofore has been neglected. A year ago a considerable quantity of Grimes came forward, a large part of which arrived overripe and wasty. This past season, however, they landed in splendid condition and were much in demand.

If the Grimes can be carried in good condition and the marketing period extended, it should continue to grow in favor. The variety has many desirable qualities and should do well in England provided it is handled properly. If the reputation which was established last year can be maintained, it should soon rank along with some of the present favorites.

The Stayman Winesap, unknown a few years ago, is also becoming better known and more appreciated. Supplies were short but the demand for those available was quite active. The Golden Delicious is also creating some interest. Quantities have been too light to create much of an impression. Buyers, however, are frequently to be seen sampling them and discussing their possibilities. The Red Delicious is becoming better known each year and the condition of the fruit this year is deserving of special mention. It possessed good keeping qualities and even late arrivals were hard, juicy and attractive in appearance. Incidentally Hood River Delicious arrived in similar condition and was well received.

Supplies of barreled apples from New York State were received off and on throughout the season. With the exception of a few parcels the outturn was generally of satisfactory condition. Shipments from the New England States were light but those which did arrive landed in good condition and were appreciated by the trade, the outturn being decidedly superior to that of a year ago.

The export movement in baskets was not particularly heavy. There has been a general improvement in the handling of this package on the receiving end and although the box and barrel continue to be the most popular packages, the basket is receiving additional attention.

Advances and Guaranteed Advances

At the beginning of the season there was much uncertainty over future marketing possibilities. Brokers who in past years had a good business on a firm order basis particularly in boxed apples, complained

about the small amount of business contracted for at the opening of the deal. Some brokers did practically nothing at the start while others bought a few cars on their own account, which were split up between many small buyers. These brokers served customers who were formerly supplied by the regular importer.

For several weeks a deadlock existed between grower and purchaser. Growers resolved at the beginning of the season not to pack and ship their fruit unless assured of a price high enough to cover the cost of production. The experience of the previous season made growers skeptical about incurring losses over their growing and harvesting costs. The position of the purchaser was that at an f.o.b. price of about \$0.85 apples would have to sell on the British market for at least 13/- (\$2.25) per box. Many buyers did not feel that the market would support such a price so trading was slow. However, after the ruling was handed down legalizing the C grade pack f.o.b. prices dropped and growers had to sell at less than they had expected to early in the season.

Certain firms, in fact many of them, have made it a practice in past years to secure shipments by offering an advance of some kind. In certain instances this advance is made early in the season against growing and harvesting costs. In others, a guaranteed advance against the fruit itself is made at the time of shipment. These advances, as arranged or handled by certain firms, have proved quite satisfactory. They have provided the grower with sufficient funds to enable him to carry on with his operations. Certain evils, however, have come out of this arrangement. There are some firms who regard an advance as a final sale and make little effort to secure a price over and above the amount of the advance, plus transportation and selling charges. Fruit brought forward under these conditions is placed in competition with supplies which have been purchased outright. Naturally business has been injured and the f.o.b. operator has been forced to move with extreme caution. Unless a shipper has full confidence in the moral responsibility of his receiver he is apt to lay himself open to some severe financial punishment.

The practice of some commission men of making little or no effort to secure higher prices than the combined advance and handling costs has the effect of establishing a market price, against which fruits purchased on an f.o.b. basis find it difficult to compete. It is the general opinion among leading exporters and importers that the principle underlying guaranteed advances has been abused and should be discouraged as much as possible.

Market Conditions and Trade Restrictions in Europe a/

Although the marketing position was more favorable from a supply standpoint in 1932-33 than in the previous season, there were too many artificial factors in operation to permit of a free flow of trade. The general uncertainty of the future was also a most disturbing influence. In England the fluctuating exchange and increased duties made trading hazardous. Brokers in France had difficulty in securing licenses. Not only was the quantity of fruit allowed to enter France greatly curtailed but an importer had to take the risk of rejection. The situation in Denmark was not only difficult but next to impossible. Direct imports of United States apples were almost negligible. This was because of the exchange restrictions and licensing system in force in that country. Norway had unofficial exchange restrictions in force in 1932-33 in addition to the very high duties prevailing in that country. Some headway was made in marketing United States apples in Poland but here again high duties and other trade restrictions stifled trade.

The only countries in Europe which provided reasonably normal trading conditions were Germany, Holland, and Belgium. In Germany the exchange restrictions offered a certain amount of difficulty to shippers. Holland increased fruit duties by 3 per cent ad valorem. In all three countries the reshipment business that formerly was important in these countries was seriously curtailed by import restrictions adopted in such countries as Poland, Denmark, Norway and France which in past years drew a considerable share of their apple imports from trans-shipment and free ports in Germany, Holland, and Belgium. The trade barriers that have been raised against apples are now so numerous that a brief resume has been made of the barriers existing in a number of countries. (See table, page 35).

The United Kingdom: The first restriction which was placed on apple exports from the United States to the United Kingdom was the "Raw Apples Order of 1930". The reason given for invoking this order was that apple maggots were discovered in some shipments of apples from the Atlantic states. The order prohibited the importation during the period July 7 to November 15, of each year, of all United States apples except the two highest recognized grades or Extra Fancy and Fancy grades in boxed apples, and Fancy and U.S. No. 1 grades in barreled or basketed apples. This order was not extended to apples from Canada, in which country apple maggots are also known to exist. Except for customs difficulties which still continue no great injury was done to the apple export trade of the United States by this order. This is because demand conditions have been so poor since 1930 that there has been plenty of apples of the higher grades available to export to England. With the return of business to normal such as prevailed before 1930, it may develop that the fruit trade will find this embargo on the lower grades of apples a serious deterrent to business.

On March 1, 1932, a general tariff act (the Import Duties Act) went into effect imposing a general tariff of 10 per cent ad valorem on all imports from sources outside the Empire, except goods already subject to import duties and certain items, specifically exempted in the Act. Among other items raw apples, pears, oranges, and grapefruit were made dutiable.

a/ Based in part on the fruit section of "World Trade Barriers in Relation to American Agriculture" which was prepared by Gustave Burmeister and A.C. Edwards. (Senate Doc. No. 70, 73rd Congress, 1st session).

As a result of the Ottawa Conference specific rates were adopted on November 17, 1932, which either supplanted the 10 per cent rate or increased it during certain seasons of the year. The rate on apples and pears was changed to a specific rate of 4s.6d. per cwt. (112 lbs.). This more than doubled the duty that was charged on the ad valorem basis. On April 1, 1933 this rate worked out at about 30¢ a box or basket and 99¢ a barrel.

Gold payments were suspended in the United Kingdom on September 21, 1931. Since that time the pound has been below par of \$4.87. During the 1931-32 apple season British money has been on an average about 24 per cent below par and in 1932-33 around 30 per cent. The depreciation of sterling in terms of Canadian money has been only about one-half that of United States money. In other words in addition to the specific duty mentioned above American apples had to meet price competition of apples from a country with depreciated currency. In the 1932-33 season competition from Canada was very difficult to meet. This was not only because Canada had a large apple crop and consequently a large quantity of apples to ship but because the duty-free character of the apples and the favorable exchange rate made it possible for Canadian growers to export large quantities of apples the condition of which was poor. This fruit necessarily had to be sold at a low price and resulted in a general decline in prices paid for all apples.

Germany: The present German tariffs on apples and pears have been in effect for a number of years and have not been changed since 1928. The German tariff has two rates, a general and a conventional rate. The latter is the lowest and applies to all countries except Canada and Poland. Apples and pears in boxes, baskets, barrels or any other container, are dutiable at 7 reichsmarks (\$1.67) per 100 kilos under the conventional rate and at 15 reichsmarks (\$3.57) per 100 kilos (220.46 lbs.) under the general rate. The duty on April 1 amounted to about \$0.33 on a box or basket and \$1.09 on a barrel of apples at the conventional rate, which is that charged the United States. Canadian apples under the general rate were dutiable at \$0.71 a box or basket and \$2.34, on a barrel. Although the duty has not been increased since 1928 the sales tax was raised from $\frac{3}{4}$ of 1 per cent to 2 per cent in 1932. The former rate was not collected at the time of importation but the latter rate is collected at that time and consequently becomes a part of the duty.

Apples in bulk or in sacks are given a lower rate of duty under the German tariff than fruit packed in containers. In addition, seasonal rates are in effect on such fruit. The conventional rate on bulk apples from September 25 to December 1 is 2.00 reichsmarks per 100 kilos or about \$0.10 per 44 lb. bushel, and on sacked fruit 2.50 RM. per 100 kilos, or \$0.12 per bushel. From January 1 to September 24, the rate on bulk apples is 4.50 RM. per 100 kilos (\$0.21 per bushel) and sacked fruit 7.00 RM. per 100 kilos (\$0.33 per bushel). Rates calculated as of April 1, 1933.

The lower rate on the bulk fruit seems to be explained by the erroneous belief, current in many parts of Europe, that packaged fruit, such

as American apples, offers great competition to homegrown fruit. Certain interests frequently make general complaints about unprofitable prices and demoralization of the domestic apple market, on grounds of the flooding of the market with foreign apples. Charges of dumping are also heard frequently, particularly in respect to American fruit. Such accusations, however, are seldom, if ever, related to specific instances or based upon concrete figures. Claims of this type are usually linked with demands for increased protection or with the idea of obtaining higher prices for the home product. The European apple grower, like most producers, is in favor of any import restrictions which may result in higher prices for homegrown apples. The same opinion is held by some of the trade who advocate national self sufficiency. The majority of the fruit trade of Europe, however, are not in sympathy with high duties, quotas, licenses, and other trade restrictions.

It was shown earlier in this report that American apples imported into the United Kingdom had apparently little effect on the price received by British growers for their apples. Similarly it can be shown that American apples do not offer heavy competition to home-grown supplies in such importing countries as Germany, Holland, Belgium, France, and the Scandinavian countries.

When domestic apple crops are large in continental European countries exports of United States apples are small until after the first of the year. This is borne out by an examination of the United States apple exports to Germany and other countries on the continent. Seasonal factors play an important role in the German fruit supply. The marketing of the German apple and pear crops is concentrated heavily in the last four calendar months of the year. The heaviest movement of the apple crop normally falls in the month of November, varying from the early part of the month in years of light crops to the latter part or early December in years of abundant crops. When the crop is light, domestic supplies are usually much reduced before Christmas, and even when it is large, supplies dwindle rapidly from December on, and are rarely of importance as a market factor after the middle of January or early February, because of the lack of keeping quality.

German imports of foreign apples are likewise concentrated heavily in the same months in which the German crop is being marketed, with the heaviest importation occurring during October and November. In the seven years ending June, 1932, Germany's imports during the four months September-December averaged approximately 65 per cent of the total annual imports, and 47 per cent of the average annual imports occurred within the two months of October and November. It is thus obvious that German apples are subject to heavy foreign competition during their main marketing period.

However, a further analysis of the import figures indicates, that German imports during September, October, November and December are very largely from European sources. In fact 80 per cent of the total imports during these four months come from ten Continental countries, against 12 per cent from the United States. About 85 per cent of the heavy imports

in October and November are received from the same ten countries, as compared with only 6 per cent from the United States. This fruit from nearby countries is that which is imported in sacks or bulk at the low rate of duty. The bulk and sacked fruit is of a comparable quality with that grown in Germany and consequently is not only sold when the German crop is moving to market but comes into direct competition with it on a quality and price basis. There does not seem to be any satisfactory explanation why the bulk and sacked fruit is assessed a higher duty after December 1 since the imports of such fruit after that date are light and German apples are also largely consumed unless it is a desire on part of the German Government to favor the apple industries of nearby countries.

Apples and pears showing "San Jose" scale have been prohibited entry into Germany since 1898. No tolerance is permitted. Sanitary certificates are not recognized by the Government; all entries of fruit being subject to inspection. Apples bearing "Apple Fruit Fly" or "Apple Maggot" are also denied entry. German sanitary regulations have not seriously impeded apple imports from the United States.

Germany has had very stringent restrictions on foreign exchange transactions since the financial crisis of July, 1931. All such transactions are under the control of the Reichsbank. Exchange may be purchased by recognized German firms after formal approval by their local Chamber of Commerce to cover normal trade requirements, but is limited to a specified percent of previous requirements. In 1931-32 this restriction had a serious effect on United States apple imports but in 1932-33 imports were not so seriously affected. This was because of the smaller competing supplies and lower prices.

Frances: The present tariffs on apples in France were adopted March 2, 1928. These provide that apples from the United States in containers weighing 20 kilos or less (44 lbs.) are dutiable at 15 francs per 100 kilos and those in larger containers at 7.50 francs. The larger rate is applied to apples in boxes and baskets and amounts to about \$0.13 on such containers. The rate on barreled fruit is approximately \$0.22 per barrel. There is also an import tax representing the internal turnover tax applied on fresh fruit of 2 per cent of the duty-paid value. Attempts have been made and continue to be made to have the duty substantially increased.

France has had import inspection of agricultural products for many years to prevent the introduction of injurious diseases or pests into the country. In March 1932, the French Government greatly tightened up the sanitary regulations applicable to fresh fruits. This was done to prevent the introduction of San Jose scale into France. All fruit from the United States, Australia, Canada, China, and Japan was barred entry into, or transit through, France, unless the shipments were accompanied by a certificate of sanitary inspection signed by an authorized Government inspector in the country of origin. In addition all fruits, except oranges, grapefruit, and lemons, were required to be passed by the French Sanitary Inspection Service before they could enter France. The entry, or in transit entry, of fruit was permitted to take place only through the ports of Havre, Bordeaux, Marseilles, and Dunkirk. Later in the year Chile, Austria, Hungary and Rumania were added to the list of countries which had to furnish sanitary certificates covering fruit shipments destined for France.

The result of these strict sanitary regulations was an immediate decline in the French takings of American apples and pears, particularly shipments of apples grown in the Atlantic States and packed in baskets and barrels. Boxed fruit from the Pacific States was not greatly affected by the regulations but a number of shipments of this origin also failed to pass inspection in France. The effect on the volume of apple exports from the United States to France by these regulations cannot be determined since fruit quotas were adopted shortly after the tightening up of the sanitary requirements. The rejections, however, were costly to shippers in extra handling charges and spoilage.

On July 9, 1932 France fixed quotas on imports of fresh apples, pears and certain other fresh fruits from all sources for the month of July. The ports at which these fruits were allowed to enter were Havre, Bordeaux and Marseilles. The apple and pear quotas allotted the United States in the first quarter of the 1932-33 season were very small. The quotas for the balance of the season were fixed at the average, without reduction, of direct imports of such fruits from the United States during similar months of 1929, 1930, and 1931. Beginning October 1, 1932, French importers were required to secure licenses to import apples and pears from the United States under the quota regulation. In making up the quotas no allowances were made for the apples and pears of United States origin which had been reexported to France from nearby European countries. The following table gives the quotas allotted the United States in the 1932-33 season.

II. FRANCE: Apple and pear quotas allowed the United States
in the 1932-33 season
compared with the imports in 1931-32

| Month | United States | United States | U. S. Exports to France 1931-32 | | |
|------------------|------------------|------------------|---------------------------------|-----------|-----------|
| | : quota for | : quota for | Apples and pears | Apples | Pears |
| | : apples & pears | : apples & pears | : Bushels | : Bushels | : Bushels |
| | : Metric tons | : a/ Bushels | | | |
| July.....:c/ | 150 | c/ 7,500 | 3,000 | 2,000 | 1,000 |
| August....:c/ | 30 | c/ 1,500 | 47,000 | 10,000 | 37,000 |
| September...: | 195 | c/ 9,750 | 30,500 | 17,500 | 13,000 |
| October....: | 1,200 | c/ 60,000 | 404,000 | 343,000 | 61,000 |
| November...: | 3,900 | c/ 195,000 | 429,000 | 369,000 | 60,000 |
| December...: | 4,680 | c/ 234,000 | 245,000 | 231,000 | 14,000 |
| January....: | 1,885 | c/ 94,000 | 309,000 | 298,000 | 11,000 |
| February...: | 2,140 | c/ 107,000 | 392,000 | 390,000 | 2,000 |
| March.....: | 2,125 | c/ 106,000 | 138,000 | 137,000 | 1,000 |
| April) : | | | 164,000) | 164,000) | d/ |
| May)....: 2,170 | | 135,500 | 47,000) | 47,000) | --- |
| June) : | | | 3,000) | 3,000) | --- |
| Total....: | 19,015 | 950,750 | 2,214,000 | 2,014,000 | : 200,000 |

Compiled by the Foreign Agricultural Service from official sources.

a/ Bushels of 44 pounds.

b/ Bushels of 50 pounds.

c/ All countries.

d/ Less than 500 bushels.

The total quota allowed the United States for apples and pears in the 1932-33 season was 951,000 bushels as compared with an export from the United States last year to France of over 2,200,000 bushels of apples and pears. It can be seen by these figures that the quota greatly reduced the imports of United States apples and pears as compared with 1931 and since the export outlet in the 1932-33 season has been very unsatisfactory it is safe to say that the quota together with the strict sanitary regulations reduced the probable exports to France by close to 1,000,000 bushels. The restriction of the French market at the start of the export season also had a depressing effect on apple and pear prices.

The scale restrictions imposed by the French Government worked a real hardship on both shipper and receiver alike. Difficulty was not only experienced in securing sanitary certificates on the shipping end but in effecting entry of the goods into France. In addition to rejections importers were constantly in trouble over licenses. Quotas frequently were not made public until just a few days before the new quarter. Shipments billed optional discharge were frequently refused entry upon arrival at a French port and had to be discharged elsewhere. Importers were forced to speculate against possible entry because sufficient time was not provided to do otherwise. Although good profits were made on those shipments which were allowed to enter, they were frequently neutralized by rejected lots which had to be reloaded on another steamer and sold on another market. There was said to be much speculating in licenses and those who were able to secure them were considered fortunate. French importers generally hold the view that if restrictions in force in many foreign countries on French exports are removed present difficulties in respect to fruit imports into France may be considerably relieved.

Belgium: On March 27, 1932, the Belgian apple duty was increased about 15 per cent. The rate on apples in containers of 20 kilos or less (44 lbs.) was made 172.50 francs per 100 kilos. Boxed and basketed apples and apples packed in any container with internal packing were charged this rate. The duty on a box or basket of apples at par was \$0.96. In 1932 the rate on barrels was 5.75 francs, without shredded oiled paper, or \$0.12 per barrel. In addition to the duty a sales or transmission tax amounting to 2 per cent of the duty-paid value is collected at time of importation.

The duty on boxed apples of \$0.96 a box is so high that practically no imports for consumption in Belgium are made in that container although some fruit is repacked in larger containers in order to meet the lower rate. This high duty is partly because of the rather general impression on the Continent that American quality apples are highly competitive with home-grown apples and partly because of the prejudice entertained in certain countries on the Continent to fruit the natural life of which is prolonged by the use of any artificial means, such as cold storage or oiled wrappers.

The Netherlands: Duties on fruit in the Netherlands were raised from 8 to 10 per cent ad valorem on January 1, 1932. Later in the same year an additional surtax of 5 per cent was added making the total duty 13 per cent ad valorem. Exports to Holland have not been affected to any important extent by the increase in the duties in that country but a

considerable proportion of the reexport business formerly enjoyed by Rotterdam fruit shippers has been lost through the adoption of restrictions in nearby countries.

Poland: Import restrictions in Poland are numerous and severe. From November 1 to April 30 the duty on direct imports of boxed apples in the 1932-33 season was 30 zlotys per 100 kilos and on barreled fruit 18 zlotys. This works out at \$0.67 per box and \$1.31 per barrel. In order to make importations of fruit, licenses based on compensation exports must be secured. That means that an importer, before he can secure a license, must arrange to export goods at equivalent values, or in certain cases he must arrange compensation exports on a 2 for 1, or even a 3 for 1 basis. In addition to the license and duty requirements contingents were fixed for the import of apples and other fruits. This past season the apple import quota was fixed at 2,500 metric tons (about 125,000 bushels) for the United States. Actual direct imports were about 20,000 bushels.

Many complications can result in shipping fruit to Poland. For instance if apples are imported through Polish ports, but without a permit from the Minister of Finance, the duty is 200 zlotys per 100 kilos (\$4.45 per box). If the fruit is brought in over the frontier without a license, a flat duty of 300 zlotys per 100 kilos is charged, or about \$6.71 per box. Consequently because of the difficulties likely to be encountered in exporting to Poland, exporters should insist on having letters of credit established in America and drafts paid before the fruit is shipped.

Denmark: The duty on apples in Denmark was raised from 1 crown per 100 kilos to 5 crowns per 100 kilos on October 16, 1931. This amounted to about \$0.15 a box and \$0.50 a barrel. However the duty was the least of the worries shippers encountered during the 1932-33 season. Denmark went off the gold standard along with Norway and Sweden on September 29, 1931 and since that time the currencies of the three countries have been below par. A decree dated November 19, 1931, prohibited the export of Danish currency, checks, or drafts, without permission of the National Bank. The regulations were gradually restricted until on January 30, 1932, a law was passed which permitted imports of goods or securities only when the National Bank certified that they were not objectionable from a foreign exchange standpoint. Some exemptions were made later but apples were not included.

The effects of the exchange restrictions were not seriously felt during the latter part of the 1931-32 season but the full force became effective in 1932-33. This was partly because Denmark had a bumper apple crop in 1932. The situation from an export angle was not only difficult but next to impossible. Direct imports from the United States dropped from 470,000 bushels in 1931-32 to 136,000 bushels in 1932-33. Some importers were able to secure licenses to import apples by the way of England.

Because of the restrictions placed upon apple imports, growers took full advantage of their opportunities. Prices to producers ranged from 65 to 85 ore ($1\frac{1}{2}\%$ to 15 $\%$) per pound for best apples. Inferior grades ruled at from 20 to 40 ore ($3\frac{1}{2}\%$ to 7 $\%$) per pound. This compares with the average price for the previous season of 10 ore, or 2 $\%$ per pound.

Sweden: The Swedish duty on apples and pears was increased from 10 crowns per 100 kilos to 20 crowns per 100 kilos on February 1, 1932. On April 1, 1933 the new rate worked out at about \$0.72 per box and \$2.37 per barrel. The increase in the duty has made trading somewhat more difficult but has not been as serious a factor as the decline in the krona. The Swedish krona was worth \$0.268 at par but only \$0.181 on April 1, 1932.

During the 1932-33 season most markets were so unsatisfactory that Sweden, in spite of the high duty and unsatisfactory exchange situation, was one of the best outlets for American apples. The season got off to a good start. Importers did a fair business at a profit until after Christmas. From that time on the situation was less favorable because of increased supplies which had to be moved at lower prices. In many cases earlier profits were wiped out.

Norway: The Norwegian tariff on apples and pears was increased on January 13, 1932, by 20 per cent. The duties became 72 crowns per 100 kilos from August 1 to January 31 and 36 crowns per 100 kilos between February 1 and July 31. In dollars the duties as of April 1, 1932 were \$2.52 a box and \$8.24 a barrel for the first half of the season and \$1.26 a box and \$4.12 a barrel for the second half. These duties are so high that they practically amount to a prohibition on imports.

In addition to the high duty Norway has been off the gold standard since September 29, 1931. Unofficial exchange restrictions have made the situation even worse. Purchases of exchange were restricted to about 85 per cent of that used in the 1931-32 season. The high duty and other barriers resulted in a retail price for apples in Norway this season of from \$0.24 to \$0.27 per pound.

Miscellaneous Comments

Cold storage: The 1932-33 season has proven the benefits to be derived from precooling and cold storage. A large proportion of the American shipments arrived this season under refrigeration. Practically all such shipments landed in splendid condition. Early apples for the most part were shipped under refrigeration and the results were satisfying to the trade. The amount of overripe and wasty fruit landed was negligible. Such lots almost invariably arrived ordinary stowage. Whereas most United States apples landed in good condition, many Canadian apples were discharged in poor condition. This was because the latter were largely shipped without refrigeration. The contrast in condition between refrigerated and common stowage fruit was invariably quite striking.

For some reason, buyers in England are definitely prejudiced against locally cold-stored fruit. Apples and pears which have been in cold storage in the United States and shipped over during the winter months are never questioned. Such shipments are spoken of and sold as fresh arrivals and are considered to be worth from 1 to 3 shillings (\$0.17 to \$0.51) per barrel more than locally stored stock. It is customary to catalog apples that are to be sold according to whether they were shipped under refrigeration, or in common stowage, or whether they were ex local cold storage. One reason for the prejudice against locally stored apples may be that they are usually held at several degrees higher temperature than in America.

Slack barrels: There was a decided decrease in the proportion of barrels that landed slack in the 1932-33 season as compared with 1931-32. British buyers are very particular about this point and discount barrels irrespective of market conditions. It is true that barrels are discounted less when supplies are short and demand active but nevertheless they are always subject to some discount.

Some growers have learned to pack their fruit so that the majority of the containers are tight when discharged, others, however, are less successful. Slack barrels cost the shipper money and frequently the discount is equivalent to the difference between profit and loss.

Liverpool buyers are very particular about "slacks", "tickers" and "shakes". A "ticker" is a barrel which is only slightly slack or just loose enough to allow the fruit to move. A barrel is judged a "slack" if the fruit has settled from about $\frac{1}{2}$ to 1 inch in the barrel. "Shakes" may run from 1 inch to several inches slack. The depreciation on a slack barrel this last season was from 1 to 2 shillings or 17¢ to 34¢. Barrels classed as "shakes" were discounted as much as 6/- or 8/- (\$1.02 to \$1.36). "Tickers" are discounted about the same as slacks.

Auction reports at Liverpool show that approximately 275,000 barrels of United States apples were sold. Of this amount 52,000 were slack, or 19 per cent. This compares with total sales in 1931-32 of 515,000 of which

APPLIES: Import duties as of April 1, 1933 compared with those in effect November 1, 1928
and the import restrictions and regulations in the chief importing countries of the world.

| Country and currency | Unit | Duty November 1, 1928 | Duty April 1, 1933 | Import Restrictions and Regulations |
|----------------------|------------------|-----------------------|-----------------------|---|
| United Kingdom | | | | |
| Pound sterling | Cwt. (112 lbs.) | Free | 4s. 6d. | Embargo July 7 to Nov. 15 against United States apples |
| Par value \$4.867 | | | | : except two highest recognized grades. |
| Current \$3.422 | Box, net | Free | \$0.30 | : Sanitary inspection; Certificate required. |
| | Barrel, net | Free | 0.99 | : Gold payments suspended September 21, 1931. |
| | | | | |
| Germany | | | | |
| Reichsmark | 100 kilos, net | 7 marks | 7 marks | Exchange purchases limited to about 50% same month 1931. |
| Par value 23.82¢ | Box, net | \$0.33 | \$0.33 | Sanitary inspection for San Jose scale and other insect pests. |
| | Barrel, net | 1.09 | 1.09 | |
| | | | | |
| France | | | | |
| Franc | 100 kilos, gross | a/ 7.5 or 15 francs | a/ 7.5 or 15 francs | Sanitary inspection for pests, particularly San Jose scale; certificate required. |
| Par value 3.92¢ | Box, gross | \$0.13 | \$0.13 | |
| | Barrel, gross | 0.22 | 0.22 | Imports regulated by quota and licenses. |
| | | | | |
| Netherlands | | | | |
| Florin | Ad valorem | 8% | b/ 10% + 3% | Sanitary inspection. |
| Par value 40.20¢ | | | | |
| | | | | |
| Belgium | | | | |
| Franc | 100 kilos | a/ 5 or 150 francs | a/ 5.75 or 172.50 fr. | Certificate required affirming freedom from disease. |
| Par value 2.78¢ | Box, net | \$0.83 | \$0.96 | |
| | Barrel, gross | 0.10 | 0.12 | |
| | | | | |
| Denmark | | | | |
| Krone | 100 kilos, net | 1 crown | 5 crowns | Exchange restrictions. |
| Par value 26.8¢ | | | | |
| Current 15.27¢ | Box, net | \$0.05 | \$0.15 | Gold payments suspended September 29, 1931. |
| | Barrel, net | 0.175 | 0.50 | |
| | | | | |
| Sweden | | | | |
| Krona | 100 kilos, net | 10 crowns | 20 crowns | Gold payments suspended September 29, 1931. |
| Par value 26.80¢ | | | | |
| Current 18.12¢ | Box, net | \$0.54 | \$0.72 | |
| | Barrel, net | 1.75 | 2.37 | |
| | | | | |
| Norway | | | | |
| Krone | 100 kilos, net | c/ 30 or 60 crowns | c/ 36 or 72 crowns | Gold payments suspended September 29, 1931. |
| Par value 26.80¢ | | | | |
| Current 17.52¢ | Box, net | c/ \$1.61 or \$3.22 | c/ \$1.26 or \$2.52 | Unofficial exchange restrictions. |
| | Barrel, net | c/ \$.25 or \$10.50 | c/ \$4.12 or \$8.24 | |
| | | | | |
| Argentina | | | | |
| Gold peso | 100 kilos gross | Free | 6.3 gold pesos | Sanitary inspection; certificate required. |
| Par value 96.48¢ | | | | |
| Current 58.22¢ | Box, gross | Free | \$0.83 | Suspended gold payments Dec. 16, 1929. |
| | Barrel, gross | Free | 2.75 | Partial exchange restrictions. |
| | | | | |
| Cuba | | | | |
| Peso | 100 kilos, gross | .80 gold pesos | 1.20 gold pesos | Sanitary regulations. |
| Par value \$1.00 | Box, gross | \$0.18 | \$0.27 | |
| | Barrel, gross | .60 | 0.90 | |
| | | | | |
| Canada | | | | |
| Dollar | | | | |
| Par value \$1.00 | | | | |
| Current 83.13¢ | Box | d/ \$0.30 | e/ About \$0.30-0.35 | Sanitary inspection and marking and packing regulations. |
| | Barrel | d/ 0.90 | e/ About \$0.90-1.15 | Prohibited gold exports October 19, 1931. |
| | | | | |

Compiled by the Foreign Agricultural Service of the Department of Agriculture and the Division of Foreign Tariffs, Department of Commerce. Converted to dollars at the prevailing rates of exchange as of April 1, 1933. A box or a basket is considered as weighing 44 pounds net or 50 pounds gross and a barrel 144 pounds net or 165 pounds gross.

a/ The smaller rate of duty applies to containers larger than 20 kilos (44 pounds). The larger rate to the containers of less than 44 pounds. Boxes are classified as small containers. b/ Provisional surtax of 3 per cent imposed in 1928.

c/ The lower rate applies between February 1 and July 31. The larger rate during the other months. d/ Sales tax was 2 per cent in 1928. e/ Approximate; 20 per cent ad valorem on a fixed valuation; providing that the duty shall not be less than a minimum of 3/5¢ a pound. In both cases the 3 per cent excise tax on the duty-paid value has been added; gross weight is used; converted to gold dollars. There is also a sales tax of 6 per cent.

PEARS: Import duties as of April 1, 1933, compared with those in effect November 1, 1928 and the import restrictions and regulations in the chief importing countries of the world.

| Country and currency | Unit | Duty November 1, 1928 | Duty April 1, 1933 | Import Restrictions and Regulations |
|----------------------|------------------|-----------------------|------------------------|---|
| United Kingdom | | | | |
| Pound | Cwt. (112 lbs.) | Free | 4s. 6d. | Sanitary inspection; certificate required. |
| Par value \$4.867 | | | | |
| Current \$3.422 | Box, net | Free | \$0.30 | Gold payments suspended |
| | Barrel, net | Free | \$1.10 | September 21, 1931. |
| | | | | |
| Germany | | | | |
| Reichsmark | 100 kilos, net | 7 marks | 7 marks | Sanitary inspection for disease and pests. |
| Par value 23.82¢ | Box, net | \$0.33 | \$0.33 | Exchange purchases limited to about 50% same month 1931. |
| | Barrel, net | 1.21 | 1.21 | |
| | | | | |
| France | | | | |
| Franc | 100 kilos, gross | a/10 or 20 francs | a/ 10 or 20 francs | Sanitary inspection, particularly San Jose scale; certificate required. |
| Par value 3.92¢ | Box, gross | \$0.13 | \$0.13 | Imports regulated by quota and licenses. |
| | Barrel, gross | 0.32 | 0.32 | |
| | | | | |
| Netherlands | | | | |
| Florin | Ad valorem | 8% | b/ 10% + 3% | Sanitary inspection. |
| Par value 40.20¢ | | | | |
| | | | | |
| Belgium | | | | |
| Franc | 100 kilos | a/18 or 150 francs | a/ 20.70 or 172.50 frs | Certificate required affirming freedom from diseases. |
| Par value 2.78¢ | Box, net | \$0.83 | \$0.96 | |
| | Barrel, gross | 0.36 | 0.42 | |
| Denmark | | | | |
| Krone | 100 kilos, net | 1 crown | 5 crowns | Exchange restrictions. |
| Par value 26.80¢ | | | | |
| Current 15.27¢ | Box, net | \$0.05 | \$0.15 | Gold payments suspended |
| | Barrel, net | 0.19 | 0.55 | September 29, 1931. |
| | | | | |
| Sweden | | | | |
| Krona | 100 kilos, net | 10 crowns | 20 crowns | Gold payments suspended |
| Par value 26.80¢ | | | | September 29, 1931. |
| Current 18.12¢ | Box, net | \$0.54 | \$0.72 | |
| | Barrel, net | 1.95 | 2.63 | |
| | | | | |
| Norway | | | | |
| Krone | 100 kilos, net | c/30 or 60 crowns | c/ 36 to 72 crowns | Gold payments suspended |
| Par value 26.80¢ | | | | September 29, 1931. |
| Current 17.52¢ | Box, net | c/\$1.61 or \$3.22 | c/ \$1.26 or \$2.52 | Unofficial exchange restrictions. |
| | Barrel, net | c/\$5.84 or \$11.67 | c/ \$4.58 or \$9.15 | |
| | | | | |
| Argentina | | | | |
| Gold peso | 100 kilos, gross | Free | 6.3 gold pesos | Sanitary inspection. |
| Par value 96.48¢ | | | | |
| Current 58.22¢ | Box, gross | Free | \$0.83 | Suspended gold payments |
| | Barrel, gross | Free | 2.99 | December 16, 1929. |
| | | | | Partial exchange restriction. |
| Cuba | | | | |
| Peso | 100 kilos, gross | .80 gold pesos | 1.20 gold pesos | Sanitary regulations. |
| Par value \$1.00 | Box, gross | \$0.18 | \$0.27 | |
| | Barrel, gross | 0.65 | 0.98 | |
| Canada | | | | |
| Dollar | 100 lbs. | d/ \$0.50 | e/f/About \$0.75 | Sanitary inspection and marking and packing regulations. |
| Par value \$1.00 | | | | |
| Current 83.13¢ | Box | d/ \$0.25 | e/g/About \$0.33-0.40 | Prohibited gold exports |
| | Barrel | d/ 0.80 | e/g/About \$1.20-1.50 | October 19, 1931. |
| | | | | |

Compiled by the Foreign Agricultural Service of the Department of Agriculture. Converted to dollars at the prevailing rates of exchange as of April 1, 1933. A box or a basket is considered as weighing 44 pounds net or 50 pounds gross and a barrel as 160 pounds net and 180 pounds gross. a/ The smaller rate applies to containers larger than 20 kilos (44 lbs.) and the other rate to containers of 20 kilos or less. Boxes and baskets take the largest rate. b/ Provisional surtax of 3 per cent imposed in 1932. c/ The lower rate applies between February 1 and July 31. The larger during the other months. d/ Sales tax was 2 per cent. e/ Plus a 3 per cent ad valorem excise tax. The sales tax is 6 per cent. Gross weight is used. f/ Duty is 20 per cent ad valorem on fixed valuation, providing that the duty shall not be less than 3¢ a pound. g/ Gold dollars.

131,000 were slack, or 25.5 per cent. An estimate of the total loss on slacks shipped to Liverpool can be made when it is considered that about one-half of the barrels in that city are sold on the auction and that the average discount on "slacks" and "shakes" was about 2 shillings. This would make the total for 1932-33 about £10,000 or \$34,000. In 1931-32 the loss was about \$109,000. For the United Kingdom as a whole, the loss occasioned by barrels landing slack was probably around \$65,000 this season.

The following table gives the record of barreled apples sold at the auction together with the slacks and comparative figures for 1931-32.

III. UNITED STATES BARRELED APPLES: Slack and tight barrels on the Liverpool auction in 1932-33 as compared with 1931-32.

| Month | 1931 - 32 | | | 1932 - 33 | | | |
|---------------|----------------|------------------|------------------------|----------------|-------------------|------------------|----------------------|
| | Total sales | Percent slack | Estimated loss | Total sales | Slacks Barrels | Percent slack | Estimated loss |
| | Barrels | Barrels | Pounds | Barrels | Barrels | Barrels | Pounds |
| | : | : | : <u>sterling</u> : | : | : | : | : <u>sterling</u> |
| July..... | 1,548 | 100.0 | 154 | -- | -- | -- | -- |
| August..... | 4,391 | 89.3 | 392 | 2,310 | 1,596 | 69.1 | 160 |
| September.... | 45,864 | 60.3 | 2,767 | 30,691 | 12,590 | 41.0 | 1,259 |
| October..... | 55,053 | 34.5 | 1,900 | 64,728 | 13,392 | 20.7 | 1,339 |
| November.... | 117,736 | 17.5 | 2,065 | 72,848 | 10,992 | 15.1 | 1,099 |
| December.... | 64,186 | 44.5 | 2,858 | 28,429 | 8,204 | 28.9 | 820 |
| January..... | 29,721 | 19.2 | 569 | 14,991 | 824 | 5.5 | 82 |
| February.... | 101,014 | 9.1 | 916 | 23,861 | 2,048 | 7.1 | 205 |
| March..... | 71,747 | 13.1 | 941 | 21,592 | 1,437 | 6.7 | 144 |
| April..... | 23,279 | 23.0 | 536 | 8,644 | 444 | 5.1 | 44 |
| May..... | -- | -- | -- | 1,519 | 36 | 2.4 | 4 |
| Total..... | 514,539 | 25.5 | 14,098 | 274,613 | 51,563 | 18.8 | 5,156 |

Compiled by the Foreign Agricultural Service from trade sources.

Slack boxes: Slack packs in boxed apples were more prevalent this past season than in former years. Complaints from Continental receivers were frequent throughout the year. In Rotterdam in particular many shipments were flat with apples in many cases falling below the sides and ends of the box. Since fruit is sold largely on a weight basis buyers discriminate against slack packs in any container because they indicate short weight. The Northwest has established a reputation on world markets which they cannot afford to lose. Many countries are attempting to imitate the Northwest pack because of its popularity as a package and a few have been quite successful.

The bushel basket: The position with regard to the bushel basket as an export package has shown slow but notable signs of improvement. The volume of pears shipped in bushel tubs reached significant proportions the past season. They proved quite popular and met with an active demand. This demand was, no doubt, accentuated by the excellent condition in which the

fruit arrived and the fact that they carried a little more weight than boxes.

Since considerable opposition was prevalent while the package was being introduced, it is interesting to watch the increased shipments of baskets. The elimination of the round bottom type has been almost complete. Since shipments have been largely confined to the flat bottom and raised bottom types the package has arrived in much better condition. Round bottom packages carry a higher freight rate than the flat-bottom, straight-sided tub. Projecting cross-slats have also been ruled out by the steamship companies under the 40 cent rate. If slats project, the ocean freight is 60 cents.

The stacking and loading of baskets on the quays and on lorries and railway vans is beginning to receive more careful attention. Instructions have been sent out to the trade advising them as to how baskets should be handled on the receiving end. Furthermore, brokers have been interviewed and assistance given on the docks relative to proper handling and stacking.

The basket is a good utility package and lends itself to reshipment. If the American demand is insufficient to absorb the volume of baskets supplied they can be exported. This gives a grower an opportunity to cater to several markets.

Dried and Canned Apples

Dried apples: The volume of dried apples exported in the 1932-33 season was about 18,300 short tons or 16 per cent above the preceding season and somewhat above the average of the 5 years, 1926-27 to 1930-31. As in the case of fresh apples the value was low only reaching \$2,300,000, or \$126 a ton. In 1931-32 exports had an average value of \$155 per ton and in the 5-year period, mentioned above, \$220 a ton. Germany, the Netherlands, Sweden, France, the United Kingdom, and other Continental European countries took the bulk of the exports. For detailed information on the exports by countries see table XVI, page 50.

Canned apples: Exports of canned apples and apple sauce in the 1932-33 season amounted to about 360,000 50-pound cases valued at \$686,000. The quantity was about up to average but the value was considerably below average. The export value per case in 1932-33 was \$1.91 as against \$2.20 in 1931-32 and the 5-year average of \$2.72. As usual the United Kingdom took the bulk of the exports of canned apples and apple sauce. Exports by country are given in table XVII, page 50.

IV. APPLES: Production and exports, barreled, boxed and total,
United States and Canada, 1922-23 to 1932-33

| | Total United States | U. S. boxed apples | U. S. barreled apples | | | | | | |
|----------------|---------------------|--------------------|-----------------------|-----------------------|-----------------|--------------------------|-----------------|-----------------|------------------|
| Marketing year | Commercial crop | Ex-ports | Per cent of crop | Commercial crop | Ex-ports | Per cent of crop | Commercial crop | Ex-ports | Per cent of crop |
| July-June | a/ | ported | a/ | ported | a/ | a/ | ported | a/ | ported |
| | Million bushels | Million bushels | Per cent | Million bushels | Million bushels | Per cent | Million bushels | Million bushels | Per cent |
| 1922-23.... | 95.8 | 5.3 | 5.5 | 38.1 | 3.5 | 9.2 | 57.7 | 1.8 | 3.1 |
| 1923-24.... | 107.8 | 12.3 | 11.4 | 49.8 | 6.2 | 12.4 | 58.0 | 6.1 | 10.5 |
| 1924-25.... | 84.0 | 9.6 | 11.4 | 33.2 | 5.1 | 15.4 | 50.8 | 4.5 | 8.9 |
| 1925-26.... | 99.7 | 11.0 | 11.0 | 43.0 | 5.4 | 12.6 | 56.7 | 5.6 | 9.9 |
| 1926-27.... | 117.4 | 21.3 | 18.1 | 44.5 | 7.8 | 17.5 | 72.9 | 13.5 | 18.5 |
| Average... | 100.9 | 11.9 | 11.8 | 41.7 | 5.6 | 13.4 | 59.3 | 6.3 | 10.6 |
| 1927-28.... | 78.1 | 9.4 | 12.0 | 33.6 | 5.4 | 14.0 | 39.5 | 4.0 | 10.1 |
| 1928-29.... | 106.4 | 21.0 | 19.7 | 51.0 | 12.0 | 23.5 | 55.4 | 9.0 | 16.2 |
| 1929-30.... | 86.5 | 10.3 | 11.9 | 39.7 | 6.0 | 15.1 | 46.8 | 4.3 | 9.2 |
| 1930-31.... | 101.0 | 20.3 | 20.0 | 51.9 | 12.0 | 23.1 | 49.1 | 8.3 | 16.9 |
| 1931-32.... | 104.2 | 17.9 | 17.2 | 38.4 | 9.3 | 24.2 | 65.8 | 8.6 | 13.0 |
| Average... | 95.2 | 15.8 | 16.6 | 43.9 | 8.9 | 20.5 | 51.3 | 6.8 | 13.3 |
| 1932-33.... | 85.2 | 13.8 | 16.2 | 40.6 | 8.5 | 20.9 | 44.6 | 5.3 | 11.9 |
| | Total Canadian | | Canadian boxed apples | Canadian boxed apples | | Canadian barreled apples | | | |
| Marketing year | Crop | Ex-ports | cent of crop | Crop | Ex-ports | cent of crop | Crop | Ex-ports | cent of crop |
| July-June | | | | | | | | | |
| | ported | | | | | | ported | | |
| | Million bushels | Million bushels | Per cent | Million bushels | Million bushels | Per cent | Million bushels | Million bushels | Per cent |
| 1922-23.... | 11.7 | 4.7 | 40.2 | 2.8 | b/ | b/ | 8.9 | b/ | b/ |
| 1923-24.... | 11.5 | 4.9 | 42.6 | 3.3 | b/ | b/ | 8.2 | b/ | b/ |
| 1924-25.... | 8.9 | 4.2 | 47.2 | 2.7 | b/ | b/ | 6.2 | b/ | b/ |
| 1925-26.... | 8.9 | 4.3 | 48.3 | 2.8 | b/ | b/ | 6.1 | b/ | b/ |
| 1926-27.... | 8.8 | 3.1 | 35.2 | 3.9 | b/ | b/ | 4.9 | b/ | b/ |
| Average... | 10.0 | 4.2 | 42.0 | 3.1 | b/ | b/ | 6.9 | b/ | b/ |
| 1927-28.... | 8.4 | 2.8 | 33.3 | 3.2 | b/ | b/ | 5.2 | b/ | b/ |
| 1928-29.... | 9.7 | 3.3 | 34.0 | 4.4 | 1.0 | 22.7 | 5.3 | 2.3 | 43.4 |
| 1929-30.... | 11.8 | 5.6 | 47.5 | 5.3 | .8 | 24.2 | 8.5 | 4.8 | 56.5 |
| 1930-31.... | 10.2 | 4.7 | 46.1 | 4.3 | 1.3 | 30.2 | 5.9 | 3.4 | 57.6 |
| 1931-32.... | 11.4 | 5.0 | 43.9 | 3.4:c/ | .8:c/ | 23.5 | 7.5:c/ | 4.2:c/ | 56.0 |
| Average... | 10.3 | 4.3 | 41.7 | 3.7:d/ | 1.0:d/ | 27.0 | 6.5:d/ | 3.7:d/ | 56.9 |
| 1932-33.... | 11.9:c/ | 5.6:c/ | 47.1 | 5.1:c/ | 2.1:c/ | 41.2 | 6.8:c/ | 3.5:c/ | 51.5 |

Compiled by the Foreign Agricultural Service from official sources.

a/ Commercial apple crop or that portion of the total crop sold for fresh consumption. b/ Not available. c/ Approximate. d/ Four year average.

V. BOXED APPLES: United States exports by countries, July to June

| Countries and Months | | | | | | | Average | | |
|----------------------------|---------|----------|---------|----------|---------|---------|---------|-------|-------|
| | 1927-28 | 1928-29 | 1929-30 | 1930-31 | 1926-27 | 1931-32 | 1932-33 | a/ | a/ |
| | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | boxes | boxes | boxes | boxes | boxes | boxes | boxes | boxes | boxes |
| United Kingdom.... | 2,708.7 | 4,835.6 | 2,654.8 | 3,846.0 | 3,553.6 | 3,415.1 | 3,429.1 | | |
| Germany..... | 736.6 | 2,695.0 | 946.2 | 3,269.5 | 1,776.8 | 1,968.1 | 2,221.7 | | |
| Netherlands..... | 71.9 | 1,687.3 | 271.7 | 2,244.0 | 989.0 | 1,293.3 | 1,660.1 | | |
| France..... | .6 | 76.9 | 49.4 | 553.0 | 137.1 | 903.0 | 882.7 | | |
| Belgium..... | 3.9 | 65.2 | 9.5 | 47.5 | 26.5 | 63.3 | 91.5 | | |
| Sweden..... | 218.2 | 537.4 | 268.8 | 164.5 | 237.0 | 210.8 | 217.7 | | |
| Norway..... | 101.2 | 84.0 | 91.2 | 94.9 | 93.3 | 74.6 | 63.6 | | |
| Denmark..... | 143.8 | 193.3 | 100.6 | 198.6 | 158.6 | 250.9 | 79.4 | | |
| Finland..... | 37.4 | 53.4 | 52.6 | 47.0 | 46.0 | 24.1 | 43.4 | | |
| Poland and Danzig: | 0 | 0 | 0 | 4.4 | .9 | 79.2 | 11.4 | | |
| Other Europe.... | 2.5 | 29.2 | 26.1 | 65.3 | 25.2 | 7.4 | 46.2 | | |
| Total Europe.... | 4,024.8 | 10,057.3 | 4,470.9 | 10,534.7 | 7,046.0 | 8,289.8 | 7,746.8 | | |
| Canada..... | 541.8 | 636.3 | 499.9 | 475.0 | 576.5 | 212.2 | 113.1 | | |
| Mexico..... | 75.1 | 114.5 | 75.1 | 62.6 | 85.2 | 3.4 | 19.9 | | |
| Cuba..... | 60.0 | 67.7 | 47.2 | 55.4 | 64.5 | 33.8 | 27.1 | | |
| Brazil..... | 115.0 | 211.9 | 192.1 | 169.7 | 172.2 | 126.7 | 127.8 | | |
| Argentina..... | 226.9 | 335.9 | 294.4 | 257.0 | 253.8 | 157.3 | 90.9 | | |
| Panama..... | 23.2 | 27.1 | 26.4 | 36.9 | 23.6 | 34.6 | 37.0 | | |
| Philippines..... | 88.3 | 150.4 | 88.5 | 112.0 | 93.4 | 104.5 | 103.5 | | |
| China..... | 32.9 | 59.2 | 36.6 | 27.5 | 32.3 | 40.2 | 28.9 | | |
| Hong Kong..... | 31.2 | 48.4 | 26.2 | 29.6 | 30.0 | 50.0 | 40.6 | | |
| British India..... | .2 | .1 | 2.3 | 23.5 | 5.3 | 38.5 | 25.0 | | |
| Egypt..... | 27.9 | 119.2 | 33.4 | 68.1 | 60.1 | 27.6 | 28.6 | | |
| Others..... | 137.0 | 198.5 | 204.8 | 186.2 | 215.3 | 183.4 | 114.5 | | |
| Total..... | 5,384.3 | 12,026.5 | 5,997.8 | 12,038.2 | 8,658.2 | 9,302.0 | 8,503.7 | | |
| Total by months : | : | : | b/ | : | b/ | : | b/ | : | b/ |
| July..... | 101.3 | 235.6 | 91.0 | 233.0 | 172.5 | 421.4 | 421.7 | | |
| August..... | 378.3 | 411.2 | 261.5 | 417.9 | 348.3 | 496.3 | 354.6 | | |
| September..... | 248.0 | 347.5 | 241.7 | 509.4 | 378.6 | 513.7 | 464.1 | | |
| October..... | 836.2 | 2,353.1 | 771.8 | 1,548.0 | 1,353.0 | 1,108.5 | 1,393.0 | | |
| November..... | 1,136.8 | 1,821.2 | 1,324.6 | 2,431.8 | 1,660.8 | 1,111.3 | 1,537.1 | | |
| December..... | 785.5 | 1,082.3 | 986.5 | 2,116.4 | 1,205.4 | 667.5 | 901.9 | | |
| January..... | 841.8 | 1,790.6 | 827.8 | 1,488.4 | 1,160.6 | 1,541.3 | 1,203.6 | | |
| February..... | 504.4 | 1,598.5 | 714.6 | 1,459.3 | 1,066.3 | 1,595.0 | 930.2 | | |
| March..... | 335.6 | 1,466.1 | 473.4 | 1,819.6 | 918.4 | 994.0 | 850.6 | | |
| April..... | 93.7 | 727.7 | 160.5 | 607.0 | 383.2 | 490.0 | 303.6 | | |
| May..... | 74.4 | 92.2 | 109.9 | 209.2 | 122.2 | 350.3 | 104.1 | | |
| June..... | 48.3 | 100.5 | 34.5 | 64.2 | 62.1 | 176.7 | 39.2 | | |
| Total boxes.... | 5,384.3 | 12,026.5 | 5,997.8 | 12,904.2 | 8,831.4 | 9,466.0 | 8,503.7 | | |
| | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | | |
| | dollars | dollars | dollars | dollars | dollars | dollars | dollars | | |
| Total value.... | 13,069 | 25,604 | 13,105 | 24,219 | 18,554 | 14,220 | 9,697 | | |
| Unit value.... | \$2.43 | \$2.13 | \$2.18 | \$1.88 | \$2.10 | \$1.50 | \$1.14 | | |

Compiled by the Foreign Agricultural Service from the official records of the Bureau of Foreign and Domestic Commerce.

a/ Approximately 866,000 baskets were exported in 1930-31 exclusive of those to Canada. These have been deducted from the boxes with which baskets were included prior to January 1932. The 1931-32 figures were adjusted to deduct 164,000 baskets. b/ Includes baskets.

VI. BARRELED APPLES: United States exports by countries, July to June

| Countries and Months | | | | | 1930-31 | | Average | | 1931-32 | | | |
|-------------------------|----------------|-----------|----------------|-----------|----------------|-----------|----------------|--|----------------|--|----------------|--|
| | : 1927-28 | | : 1928-29 | | : 1929-30 | | a/ | | : 1926-27 | | a/ | |
| | : 1,000 | | : 1,000 | | : 1,000 | | : 1,000 | | : 1,000 | | : 1,000 | |
| | <u>barrels</u> | | <u>barrels</u> | | <u>barrels</u> | | <u>barrels</u> | | <u>barrels</u> | | <u>barrels</u> | |
| United Kingdom..... | 1,004.4 | 1,720.0 | 953.1 | 1,002.0 | 1,596.9 | 1,914.6 | 1,048.5 | | | | | |
| Germany..... | 27.5 | 236.1 | 50.0 | 473.5 | 229.3 | 30.0 | 224.9 | | | | | |
| Netherlands..... | 1.7 | 200.5 | 16.5 | 392.0 | 150.3 | 52.0 | 50.5 | | | | | |
| France..... | - | 61.5 | 8.2 | 172.0 | 49.0 | 370.0 | 35.5 | | | | | |
| Belgium..... | 1.1 | 321.4 | 13.7 | 380.0 | 159.3 | 196.2 | 131.6 | | | | | |
| Sweden..... | 82.4 | 114.7 | 96.8 | 35.6 | 80.4 | 86.0 | 79.8 | | | | | |
| Norway..... | 20.0 | 25.3 | 23.2 | 11.6 | 21.8 | 19.1 | 9.0 | | | | | |
| Denmark..... | 42.1 | 81.2 | 41.5 | 65.6 | 76.2 | 73.0 | 18.6 | | | | | |
| Finland..... | 5.0 | 13.1 | 5.0 | 8.5 | 8.4 | 4.4 | 10.8 | | | | | |
| Poland and Danzig.... | .0 | 6.8 | .5 | 1.3 | 1.7 | 8.4 | 2.9 | | | | | |
| Other Europe..... | .1 | 5.8 | .8 | 8.9 | 3.3 | 11.3 | -- | | | | | |
| Total Europe..... | 1,184.3 | 2,786.4 | 1,209.3 | 2,551.0 | 2,377.1 | 2,815.0 | 1,612.1 | | | | | |
| Canada..... | 54.6 | 62.8 | 40.3 | 40.1 | 71.1 | 38.0 | 2.8 | | | | | |
| Mexico..... | 1.7 | 3.1 | 2.2 | 2.0 | 2.3 | .1 | .2 | | | | | |
| Cuba..... | 11.3 | 10.7 | 8.9 | 3.8 | 10.7 | 4.8 | 4.9 | | | | | |
| Brazil..... | 2.4 | 1.6 | 1.4 | .2 | 3.5 | 0 | 0 | | | | | |
| Argentina..... | 82.2 | 125.4 | 152.5 | 156.9 | 127.2 | 11.0 | 24.2 | | | | | |
| Others..... | 12.0 | 15.3 | 12.4 | 13.8 | 15.4 | 4.4 | 10.3 | | | | | |
| Total..... | 1,348.5 | 3,005.3 | 1,427.0 | 2,767.8 | 2,606.3 | 2,873.3 | 1,654.0 | | | | | |
| Total by months | : | : | : | b/ | : | b/ | : | | | | | |
| July..... | 14.3 | 11.7 | 25.4 | 14.4 | 14.7 | 22.3 | 2.0 | | | | | |
| August..... | 48.6 | 40.9 | 33.1 | 9.6 | 32.8 | 19.1 | 14.9 | | | | | |
| September..... | 143.3 | 78.7 | 124.8 | 123.5 | 167.6 | 295.9 | 197.8 | | | | | |
| October..... | 353.9 | 632.1 | 423.3 | 481.3 | 477.7 | 612.0 | 453.6 | | | | | |
| November..... | 332.9 | 544.6 | 274.2 | 686.6 | 616.2 | 631.6 | 435.7 | | | | | |
| December..... | 188.4 | 303.4 | 193.3 | 422.6 | 316.3 | 284.7 | 73.2 | | | | | |
| January..... | 123.0 | 458.2 | 160.2 | 299.6 | 336.7 | 380.4 | 176.0 | | | | | |
| February..... | 52.9 | 377.9 | 77.4 | 225.9 | 237.2 | 344.4 | 156.7 | | | | | |
| March..... | 29.3 | 375.3 | 90.0 | 178.4 | 230.6 | 188.3 | 115.7 | | | | | |
| April..... | 7.3 | 124.4 | 22.0 | 31.8 | 87.3 | 31.4 | 13.9 | | | | | |
| May..... | 4.5 | 13.2 | 2.5 | 4.3 | 17.7 | 6.6 | 12.5 | | | | | |
| June..... | .2 | 46.9 | .9 | .6 | 13.7 | 1.8 | 1.8 | | | | | |
| Total barrels..... | 1,348.5 | 3,005.3 | 1,427.0 | 2,478.8 | 2,548.5 | 2,818.5 | 1,654.0 | | | | | |
| | : 1,000 | : 1,000 | : 1,000 | : 1,000 | : 1,000 | : 1,000 | : 1,000 | | | | | |
| | : dollars | : dollars | : dollars | : dollars | : dollars | : dollars | : dollars | | | | | |
| Total value..... | 6,734 | 15,113 | 7,237 | 11,777 | 12,601 | 12,147 | 6,460 | | | | | |
| Unit value..... | \$4.99 | \$5.03 | \$5.07 | \$4.75 | \$4.94 | \$4.31 | \$3.91 | | | | | |

Compiled by the Foreign Agricultural Service from the official records of the Bureau of Foreign and Domestic Commerce.

a/ Adjusted to include approximately 866,000 baskets which were exported in 1930-31 but not separately reported. Includes 164,000 baskets which were exported in 1931-32, according to the International Apple Association. Figures exclusive of Canada.

b/ Not adjusted to include baskets.

VII. BASKETED APPLES: United States exports by countries,
July to June

| Country | 1932-33 | Months | 1931-32 | 1932-33 |
|------------------------|--------------|------------------------|------------------------|------------------------|
| | | <u>:1,000 baskets:</u> | <u>:1,000 baskets:</u> | <u>:1,000 baskets:</u> |
| United Kingdom..... | 87.6 | :: July..... | a/ | 29.7 |
| Germany..... | 51.3 | :: August..... | a/ | 13.9 |
| Netherlands..... | 12.2 | :: September..... | a/ | 26.8 |
| France..... | 31.9 | :: October..... | a/ | 34.0 |
| Belgium..... | 62.7 | :: November..... | a/ | 71.9 |
| Sweden..... | 4.1 | :: December..... | a/ | 23.0 |
| Norway..... | 0 | :: January..... | 25.8 | 34.5 |
| Denmark..... | .5 | :: February..... | 39.8 | 21.9 |
| Finland..... | 0 | :: March..... | 24.7 | 20.5 |
| Poland and Danzig..... | 0 | :: April..... | 3.3 | 1.2 |
| Other Europe..... | - | :: May | 13.2 | 4.5 |
| Total Europe..... | <u>250.3</u> | :: June..... | <u>3.8</u> | <u>6.2</u> |
| Canada..... | 34.4 | :: Total baskets: | <u>110.6</u> | <u>288.1</u> |
| Mexico..... | .6 | | <u>:1,000 dollars</u> | <u>:1,000 dollars</u> |
| Cuba..... | 1.0 | :: Total value... | <u>192.5</u> | <u>437.9</u> |
| Brazil..... | 0 | | <u>Dollars</u> | <u>Dollars</u> |
| Argentina..... | 0 | :: Unit value... | <u>1.75</u> | <u>1.52</u> |
| Others..... | <u>1.8</u> | | : | : |
| Total..... | <u>288.1</u> | | : | : |

Compiled by the Foreign Agricultural Service from official records of the Bureau of Foreign and Domestic Commerce.

a/ Not separately reported prior to January 1932. The International Apple Association reported shipments of 866,000 bushels in 1930-31; and 164,004 bushels in 1931-32 exclusive of Canada.

VIII. APPLES: Total United States exports by countries, July to June

| Country | Average 1926-27 to 1930-31 | | 1931-32 | | 1932-33 | |
|-----------------------|-------------------------------|-------------|------------------|-------------|------------------|-------------|
| | 1,000 bushels | Per cent | 1,000 bushels | Per cent | 1,000 bushels | Per cent |
| United Kingdom..... | 8,344.3 | 50.6 | 9,158.9 | 51.1 | 5,662.2 | 41.2 |
| Germany..... | 2,466.2 | 15.0 | 2,208.1 | 12.3 | 2,947.7 | 21.4 |
| Netherlands..... | 1,439.9 | 8.7 | 1,449.3 | 8.1 | 1,823.8 | 13.3 |
| France..... | 284.1 | 1.7 | 2,013.0 | 11.3 | 1,021.1 | 7.4 |
| Belgium..... | 506.4 | 3.1 | 651.9 | 3.7 | 549.0 | 4.0 |
| Sweden..... | 478.2 | 2.9 | 468.8 | 2.6 | 461.2 | 3.4 |
| Norway..... | 158.7 | 1.0 | 131.9 | .7 | 90.6 | .7 |
| Denmark..... | 387.2 | 2.4 | 469.9 | 2.6 | 135.7 | 1.0 |
| Finland..... | 71.2 | .4 | 37.3 | .2 | 75.8 | .5 |
| Poland and Danzig.... | 6.0 | - | 104.4 | .6 | 20.1 | .1 |
| Other Europe..... | 35.1 | .2 | 41.3 | .2 | 46.2 | .3 |
| Total Europe..... | 14,177.3 | 86.0 | 16,734.8 | 93.4 | 12,833.4 | 93.3 |
| Canada..... | 789.8 | 4.8 | 326.2 | 1.8 | 154.4 | 1.1 |
| Mexico..... | 92.1 | .5 | 5.7 | -- | 21.1 | .2 |
| Cuba..... | 96.6 | .6 | 48.2 | .3 | 42.8 | .3 |
| Brazil..... | 179.7 | 1.1 | 126.7 | .7 | 127.8 | .9 |
| Argentina..... | 635.4 | 3.9 | 190.3 | 1.1 | 163.5 | 1.2 |
| Panama..... | a/ 23.6 | .1 | 34.6 | .2 | 37.6 | .3 |
| Philippines..... | a/ 93.4 | .6 | 104.5 | .6 | 103.5 | .7 |
| China..... | a/ 32.3 | .2 | 40.2 | .2 | 28.9 | .2 |
| Hong Kong..... | a/ 30.0 | .2 | 50.0 | .3 | 40.6 | .3 |
| British India..... | a/ 5.5 | - | 38.5 | .2 | 25.0 | .2 |
| Egypt..... | a/ 60.1 | .4 | 27.6 | .1 | 30.8 | .2 |
| Others..... | 261.3 | 1.6 | 196.3 | 1.1 | 144.5 | 1.1 |
| Total..... | 16,476.9 | 100.0 | 17,921.6 | 100.0 | 13,753.9 | 100.0 |
| Total by months | | | | | | |
| July..... | 216.6 | 1.3 | 488.3 | 2.7 | 457.4 | 3.3 |
| August..... | 446.7 | 2.7 | 553.6 | 3.1 | 413.2 | 3.0 |
| September..... | 881.4 | 5.3 | 1,401.4 | 7.8 | 1,084.3 | 7.9 |
| October..... | 2,786.1 | 16.9 | 2,944.5 | 16.4 | 2,788.4 | 20.3 |
| November..... | 3,509.4 | 21.3 | 3,006.1 | 16.7 | 2,916.1 | 21.2 |
| December..... | 2,154.3 | 13.1 | 1,521.6 | 8.5 | 1,144.5 | 8.3 |
| January..... | 2,170.7 | 13.2 | 2,682.5 | 15.0 | 1,766.1 | 12.8 |
| February..... | 1,777.9 | 10.8 | 2,628.2 | 14.7 | 1,422.2 | 10.3 |
| March..... | 1,610.2 | 9.8 | 1,558.9 | 8.7 | 1,218.2 | 8.9 |
| April..... | 645.1 | 3.9 | 584.3 | 3.3 | 346.5 | 2.5 |
| May..... | 175.3 | 1.1 | 370.1 | 2.1 | 146.1 | 1.1 |
| June..... | 103.2 | .6 | 182.1 | 1.0 | 50.9 | .4 |
| Total bushels..... | 16,476.9 | 100.0 | 17,921.6 | 100.0 | 13,753.9 | 100.0 |
| | 1,000 dollars | | 1,000 dollars | | 1,000 dollars | |
| Total value..... | 31,155 | | 26,559 | | 16,595 | |
| Unit value..... | \$1.89 | | \$1.48 | | \$1.21 | |

Compiled by the Foreign Agricultural Service from official records; for notes see boxed, barreled and basketed exports.

a/ Boxes only, barrels negligible.

IX. APPLES: United States exports, by customs districts, 1927-28
to 1932-33 and the five-year average 1926-27 to 1930-31

| Customs district | Season July - June | | | | | | | |
|-----------------------------------|--------------------|----------------|--------------------|----------------|--------------------|----------------|--------------------|----------------|
| | 1927-28 | | 1928-29 | | 1929-30 | | 1930-31 | |
| | Average 1926-27 | 1927-28 | Average 1926-27 | 1928-29 | Average 1926-27 | 1927-28 | Average 1926-27 | 1928-29 |
| | 1930-31 | to 1930-31 | 1931-32 | 1932-33 | 1930-31 | 1931-32 | 1932-33 | 1930-31 |
| <u>BOXES</u> | Thou- sands | Thou- sands | Thou- sands | Thou- sands | Thou- sands | Thou- sands | Thou- sands | Thou- sands |
| New York (City)..... | 2,212 | 3,996 | 1,694 | a/ 2,912 | 2,760 | 2,000 | 1,362 | |
| Washington (Seattle) .. | 1,366 | 4,052 | 2,523 | 5,126 | 2,970 | 4,664 | 4,042 | |
| Oregon (Portland).... | 684 | 2,287 | 709 | 2,358 | 1,545 | 1,143 | 1,973 | |
| San Francisco..... | 405 | 622 | 350 | 849 | 500 | 1,002 | 852 | |
| Michigan..... | 315 | 589 | 340 | 367 | 419 | 223 | 137 | |
| Maine and New Hamp- shire..... | | | | | | | | |
| | 11 | 39 | 30 | 32 | 27 | 12 | | |
| Philadelphia..... | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Maryland (Baltimore) ..b/ | 1:c/ | 1 | 1 | 1 | 1 | 117 | | 9 |
| Florida..... | 60 | 76 | 35 | 30 | 58 | 28 | 13 | |
| San Antonio..... | 27 | 47 | 17 | 15 | 31:d/ | | | 6 |
| All others..... | 303 | 318 | 309 | 348 | 347 | 113 | 109 | |
| Total..... | 5,384 | 12,027 | 5,998 | a/12,038 | 8,658 | 9,302 | 8,504 | |
| <u>BARRELS e/</u> | | | | | | | | |
| New York (City)..... | 1,213 | 2,855 | 1,275 | a/ 2,613 | 2,373 | 2,336 | 1,401 | |
| Maryland (Baltimore) .. | 3:d/ | | 0 | 0 | 1 | 339 | | 253 |
| Maine and New Hamp- shire..... | | | | | | | | |
| | 51 | 36 | 43 | 43 | 53 | 12 | 24 | |
| Philadelphia.....d/ | | 6 | 2 | 1 | 7 | 3 | | 3 |
| Florida..... | 10 | 10 | 9 | 3 | 9 | 1 | | 1 |
| Michigan..... | 5 | 8 | 2 | 2 | 7 | 6 | | 4 |
| All others..... | 67 | 90 | 96 | 106 | 156:f/ | 176 | 65 | |
| Total..... | 1,349 | 3,005 | 1,427 | a/ 2,768 | 2,606 | 2,873 | 1,750 | |
| <u>Total in bushels g/</u> | | | | | | | | |
| New York (City)..... | 5,850 | 12,561 | 5,520 | 10,752 | 9,878 | 9,117 | 5,564 | |
| Washington (Seattle) .. | 1,366 | 4,052 | 2,523 | 5,126 | 2,970 | 4,664 | 4,042 | |
| Oregon (Portland).... | 684 | 2,287 | 709 | 2,358 | 1,545 | 1,143 | 1,973 | |
| San Francisco..... | 405 | 622 | 350 | 849 | 500 | 1,002 | 852 | |
| Michigan..... | 330 | 612 | 345 | 372 | 439 | 240 | 149 | |
| Maryland (Baltimore) .. | 10 | 1 | 1 | 1 | 4 | 1,135 | 768 | |
| All others..... | 785 | 908 | 831 | 883 | 1,141 | 731 | 406 | |
| Total..... | 9,430 | 21,043 | 10,279 | 20,341 | 16,477 | 17,922 | 13,754 | |

Compiled by the Foreign Agricultural Service from official records of the Bureau of Foreign and Domestic Commerce.

a/ Basket exports of 866,000 have been added to the New York barreled exports for 1930-31 and 164,000 for 1931-32 and deducted from the boxed exports from New York in these years. This was necessary since basketed exports had been erroneously included with boxed exports. b/ Calendar year 1927. c/ Calendar year 1928.

d/ Less than 500 barrels. e/ Baskets included with barrels. In addition to those mentioned in note a/ 288,000 baskets were added to the barrels shipped in 1932-33.

f/ Includes the equivalent of 123,000 barrels shipped from Virginia ports.

g/ Bushels of 44 pounds or the equivalent of one box or basket.

X. APPLES: Yearly average price on a bushel basis of various varieties of apples at London, 1927-28 to 1932-33

| Variety | | | | | | | Average: 1931-32: |
|---------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|----------------------|
| | 1927-28 | 1928-29 | 1929-30 | 1930-31 | 1931-32 | 1927-28 | |
| | Dollars per bu. | |
| York Imperials, Va. - | | | | | | | |
| Par of exchange..... | 2.59 | 2.32 | 2.40 | 2.51 | 2.14 | 2.39 | 2.43 |
| Prevailing exchange..... | 2.59 | 2.32 | 2.40 | 2.51 | 1.58 | 2.28 | 1.69 |
| Less duty..... | 2.59 | 2.32 | 2.40 | 2.51 | 1.55 | 2.27 | 1.39 |
| Yellow Newtons, Ore. - | | | | | | | |
| Par of exchange..... | 4.37 | 3.30 | 4.26 | 3.17 | 3.72 | 3.76 | 3.23 |
| Prevailing exchange..... | 4.37 | 3.30 | 4.26 | 3.17 | 2.73 | 3.57 | 2.22 |
| Less duty..... | 4.37 | 3.30 | 4.26 | 3.17 | 2.70 | 3.56 | 1.95 |
| Baldwins, N. S. - | | | | | | | |
| Par of exchange..... | 2.00 | 2.29 | 1.52 | 1.91 | 1.83 | 1.91 | 1.73 |
| Prevailing exchange a/... | 2.00 | 2.29 | 1.52 | 1.91 | 1.52 | 1.85 | 1.40 |
| Russets, N. S. - | | | | | | | |
| Par of exchange..... | 2.82 | 2.79 | 2.46 | 2.34 | 2.56 | 2.59 | 2.29 |
| Prevailing exchange a/... | 2.82 | 2.79 | 2.46 | 2.34 | 2.14 | 2.51 | 1.83 |
| Bramley's Seed, Eng. - | | | | | | | |
| In dollars b/..... | 1.91 | 2.49 | 2.44 | 2.20 | 2.77 | 2.36 | 2.03 |
| | | | | | | | |

Compiled by the Foreign Agricultural Service from the weekly issues of the British Agricultural Market Report. Reduced to bushels.

a/ Converted at the prevailing rate of sterling in Canadian dollars.

b/ Average for the chief British Markets except 1932-33 which is the London average.

XI. APPLES: Seasonal average prices of leading English apple varieties at a number of city markets in England, 1923 to 1932.

| Year | Seasonal averages for first quality apples | | | | | | |
|--------------|--|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| | Cox's | Worcester | Bram- | Lanes | : | : | : |
| | Elenheim | Orange | Pear- | ley's | Prince | Newtown | Average |
| | Pippin | main | Seedling | Albert | Wonder | price | |
| | Dollars per bu. | Dollars per bu. | Dollars per bu. | Dollars per bu. | Dollars per bu. | Dollars per bu. | Dollars per bu. |
| 1923-24.... | 2.82 | 6.26 | 3.82 | 2.05 | 2.25 | 2.39 | 3.27 |
| 1924-25.... | 2.77 | 6.35 | 3.53 | 2.39 | 1.89 | 2.01 | 3.17 |
| 1925-26.... | 1.96 | 5.69 | 2.77 | 2.15 | 1.60 | 1.82 | 2.67 |
| 1926-27.... | 2.53 | 7.42 | 4.06 | 2.67 | 2.44 | 2.49 | 3.60 |
| 1927-28.... | 2.10 | 5.93 | 2.20 | 1.91 | 1.77 | 1.91 | 2.64 |
| Average... | 2.44 | 6.33 | 3.29 | 2.23 | 1.99 | 2.12 | 3.07 |
| 1928-29.... | 2.29 | 7.84 | 2.87 | 2.49 | 2.01 | 2.29 | 3.30 |
| 1929-30.... | 2.44 | 7.74 | 2.63 | 2.44 | 1.65 | 1.84 | 3.13 |
| 1930-31.... | 2.15 | 5.88 | 2.63 | 2.20 | 1.74 | 2.01 | 2.78 |
| 1931-32.... | 2.49 | 7.50 | 3.25 | 2.77 | 2.15 | 2.39 | 3.43 |
| 1932-33 a/.. | 1.90 | 5.44 | 2.88 | 2.03 | 1.46 | 1.56 | 2.56 |
| Average... | 2.27 | 6.88 | 2.87 | 2.39 | 1.80 | 2.02 | 3.04 |

Compiled by the Foreign Agricultural Service from the British Ministry of Agriculture and Fisheries annual "Agricultural Statistics". Converted from basis cwts. (112 pounds) to basis of bushel (44 pounds). Par of exchange: a/ Preliminary. London prices only.

XII. APPLES: Average prices paid at Liverpool for United States apples converted at prevailing exchange, and same prices less transportation from New York and duty

| Year | Rate of exchange | Prices at prevailing exchange: | | | Average price less charges | | |
|--------------|------------------|--------------------------------|-----------------|-----------------|----------------------------|-----------------|-----------------|
| | | Yorks | Average barrels | Average boxes | Yorks | Barrels | Poxes |
| | | Dollars per bu. | Dollars per bu. | Dollars per bu. | Dollars per bu. | Dollars per bu. | Dollars per bu. |
| 1923-24..... | 4.354 | 2.25 | 2.25 | 3.11 | 1.85 | 1.85 | 2.66 |
| 1924-25..... | 4.687 | 2.44 | 2.41 | 3.09 | 2.04 | 2.01 | 3.24 |
| 1925-26..... | 4.853 | 2.31 | 2.59 | 3.58 | 1.91 | 2.19 | 3.13 |
| 1926-27..... | 4.867 | 2.03 | 1.91 | 3.26 | 1.63 | 1.51 | 2.81 |
| 1927-28..... | 4.867 | 2.70 | 2.73 | 3.76 | 2.30 | 2.33 | 3.31 |
| Average.... | 4.726 | 2.35 | 2.38 | 3.48 | 1.95 | 1.98 | 3.03 |
| 1928-29..... | 4.867 | 2.35 | 2.30 | 3.24 | 1.95 | 1.90 | 2.84 |
| 1929-30..... | 4.867 | 2.30 | 2.44 | 3.88 | 1.90 | 2.04 | 5.48 |
| 1930-31..... | 4.867 | 2.34 | 2.61 | 3.14 | 1.94 | 2.21 | 2.74 |
| 1931-32..... | 3.585 | 1.58 | 1.41 | 2.47 | 1.13 | .96 | 1.97 |
| 1932-33..... | 3.401 | 1.68 | 1.54 | 2.11 | 1.03 | .89 | 1.41 |
| Average.... | 4.318 | 2.05 | 2.06 | 2.97 | 1.59 | 1.60 | 2.49 |

Compiled by the Foreign Agricultural Service from Official British sources. Based on 8-months period, September-April. The duty on apples went into effect March 1, 1931, and was 10 per cent ad valorem. It is assumed that this reduced the yearly average price on barreled apples by 4 cents a bushel and boxed apples 5 cents a box. On November 17, 1932, the rate was changed to 4s.6d. per cwt. (112 pounds). It is assumed that this has reduced the 1932-33 averages by 25 cents a bushel. The transportation is taken to be 40 cents and 45 cents respectively on a bushel of barreled apples and a box of apples.

XIII. APPLES: United Kingdom imports of apples; English, United States and Canadian commercial crops; average price of United States apples at par of exchange and index employment

| Year | S month's: imports: a/ a/ | Average price U.S. apples: Index | | | | | | em- ploy- ment/e/ |
|--------------|---------------------------------------|----------------------------------|----------------------------------|----------------------------|--------------------|--------------------|--------------------|-------------------------|
| | | English: crop: b/ | United States: crop: b/ | Canadian: crop: crop | Yorks | Barrels c/ | Boxes d/ | |
| | | Million bushels | Million bushels | Million bushels | Million bushels | Dollars per bu. | Dollars per bu. | Dollars per bu. |
| 1923-24..... | 15.3 | 7.8 | 107.8 | 11.5 | 2.52 | 2.52 | 3.48 | 89.0 |
| 1924-25..... | 14.4 | 6.1 | 84.0 | 8.9 | 2.53 | 2.49 | 3.83 | 83.9 |
| 1925-26..... | 13.3 | 16.6 | 99.7 | 8.9 | 2.32 | 2.60 | 3.59 | 89.4 |
| 1926-27..... | 18.9 | 2.8 | 117.4 | 8.8 | 2.03 | 1.91 | 3.26 | 88.1 |
| 1927-28..... | 9.9 | 15.1 | 78.1 | 8.4 | 2.70 | 2.73 | 3.76 | 90.1 |
| Average.... | 14.4 | 9.7 | 97.4 | 9.5 | 2.42 | 2.45 | 3.53 | 89.1 |
| 1928-29..... | 12.9 | 7.4 | 106.4 | 9.7 | 2.35 | 2.30 | 3.24 | 88.6 |
| 1929-30..... | 11.5 | 16.3 | 86.5 | 11.8 | 2.30 | 2.44 | 3.88 | 63.1 |
| 1930-31..... | 11.0 | 10.0 | 101.0 | 10.2 | 2.34 | 2.61 | 3.14 | 80.0 |
| 1931-32..... | 16.1 | 4.0 | 104.2 | 11.4 | 2.14 | 1.91 | 3.35 | 78.3 |
| 1932-33..... | 14.6 | 6.4 | 85.2 | 9.5 | 2.44 | 2.21 | 3.10 | 77.8 |
| Average.... | 13.2 | 3.8 | 96.7 | 10.5 | 2.31 | 2.29 | 3.54 | 82.5 |

Compiled by the Foreign Agricultural Service from official British sources. a/ September-April. b/ Dessert and cooking apples, cider apples not included. c/ Price are for U.S. No. 1, grade and $2\frac{1}{4}$ inch size at Liverpool. Average includes Yorks, Winesaps, Albemarle Pippins, Baldwins and Rhode Island Greenings. Converted at par of exchange. d/ Quotations are for Oregon Newtowns and "Reds". e/ Percentage insured persons employed, September-April.

XIV. APPLES: Monthly average prices paid for various varieties of apples at London, 1927-28 to 1932-33 a/ b/ c/

| | At par of exchange b/ | | | | At prevailing rates of exchange c/ | | | |
|----------------|-----------------------|--------------------|-----------------|--------------------|------------------------------------|--------------------|--------------------|--------------------|
| Date | Virginia | Oregon | Nova Scotia | English | Virginia | Oregon | Nova Scotia | Scotia |
| | York | Baldwin | Russet | Bramley's Seedling | York | Newtown | Baldwin | Russet |
| | Imperial | Newtown | win. | set | Imperial | town | win. | set |
| | | | | | | | | |
| | Dollars per bushel | Dollars per bushel | Dollars per bu. | Dollars per bu. | Dollars per bushel | Dollars per bushel | Dollars per bushel | Dollars per bushel |
| <u>1927-28</u> | | | | | | | | |
| Oct. | 2.80 | - | - | - | 1.58 | 2.80 | - | - |
| Nov. | 2.26 | 4.28 | - | - | 1.95 | 2.26 | 4.28 | - |
| Dec. | 2.43 | 4.26 | 1.69 | 2.46 | 1.78 | 2.43 | 4.26 | 1.69 |
| Jan. | 2.68 | 4.33 | 2.19 | 2.87 | 2.60 | 2.68 | 4.33 | 2.19 |
| Feb. | 2.77 | 4.45 | 2.12 | 3.14 | 2.43 | 2.77 | 4.45 | 2.12 |
| Mar. | - | 4.53 | - | - | 2.97 | - | 4.53 | - |
| Average- | 2.59 | 4.37 | 2.00 | 2.82 | 2.22 | 2.59 | 4.57 | 2.00 |
| <u>1928-29</u> | | | | | | | | |
| Oct. | 2.17 | 3.17 | - | - | 2.21 | 2.17 | 3.17 | - |
| Nov. | 2.17 | 3.17 | - | - | 2.77 | 2.17 | 3.17 | - |
| Dec. | 2.48 | 3.41 | 2.43 | 3.09 | 3.58 | 2.48 | 3.41 | 2.43 |
| Jan. | 2.48 | 3.33 | 2.34 | 2.48 | 3.82 | 2.43 | 3.33 | 2.34 |
| Feb. | 2.34 | 3.31 | 2.21 | 2.75 | 3.65 | 2.34 | 3.31 | 2.21 |
| Mar. | 2.26 | 3.43 | 2.14 | 2.85 | 3.75 | 2.26 | 3.43 | 2.14 |
| Average- | 2.32 | 3.30 | 2.29 | 2.79 | 3.30 | 2.32 | 3.30 | 2.29 |
| <u>1929-30</u> | | | | | | | | |
| Oct. | 2.43 | 4.13 | - | - | 1.70 | 2.43 | 4.13 | - |
| Nov. | 2.26 | 4.01 | - | 2.85 | 2.19 | 2.26 | 4.01 | - |
| Dec. | 2.10 | 4.45 | 1.46 | 2.19 | 1.78 | 2.10 | 4.45 | 1.46 |
| Jan. | 2.46 | 4.40 | 1.46 | 2.36 | 2.19 | 2.46 | 4.40 | 1.46 |
| Feb. | 2.51 | 4.31 | 1.53 | 2.43 | 2.19 | 2.51 | 4.31 | 1.53 |
| Mar. | 2.63 | 4.26 | 1.63 | 2.48 | 2.73 | 2.63 | 4.26 | 1.63 |
| Average- | 2.40 | 4.26 | 1.52 | 2.46 | 2.13 | 2.40 | 4.26 | 1.52 |
| <u>1930-31</u> | | | | | | | | |
| Oct. | 2.68 | 3.53 | - | - | 1.70 | 2.68 | 3.53 | - |
| Nov. | 2.34 | 3.07 | 1.83 | 2.26 | 1.95 | 2.34 | 3.07 | 1.83 |
| Dec. | 2.43 | 3.14 | 2.02 | 2.43 | 2.36 | 2.43 | 3.14 | 2.02 |
| Jan. | 2.60 | 3.04 | 1.92 | 2.38 | 2.73 | 2.60 | 3.04 | 1.92 |
| Feb. | - | 3.07 | 1.92 | 2.38 | 2.80 | - | 3.07 | 1.92 |
| Mar. | - | 3.19 | 1.87 | 2.26 | 3.33 | - | 3.19 | 1.87 |
| Average | 2.51 | 3.17 | 1.91 | 2.34 | 2.48 | 2.51 | 3.17 | 1.91 |
| <u>1931-32</u> | | | | | | | | |
| Oct. | 2.12 | 3.24 | - | - | 2.36 | 1.69 | 2.58 | - |
| Nov. | 2.10 | 3.70 | 1.63 | 2.43 | 2.80 | 1.60 | 2.83 | 1.40 |
| Dec. | 1.78 | 3.72 | 1.63 | 2.43 | 2.75 | 1.23 | 2.58 | 1.37 |
| Jan. | 2.07 | 3.75 | 1.73 | 2.53 | 3.21 | 1.46 | 2.64 | 1.43 |
| Feb. | 2.36 | 4.16 | 1.95 | 2.85 | 3.46 | 1.68 | 2.95 | 1.58 |
| Mar. | 2.41 | 3.72 | 2.19 | - | 3.41 | 1.80 | 2.78 | 1.83 |
| Average- | 2.14 | 3.72 | 1.83 | 2.56 | 3.00 | 1.58 | 2.73 | 1.52 |

(Continued -)

XIV. APPLES: Monthly average prices paid for various varieties of apples at London, 1927-28 to 1932-33 a/ (Continued) -

| Date | At par of exchange b/ | | | | | | At prevailing rates of exchange c/ | | | | | | | | | | | |
|---------|-----------------------|---------|-------------|---------|----------|----------|------------------------------------|---------|---------|---------|---------|-----------|---------|---------|---------|---------|---------|------|
| | Virginia | Oregon | Nova Scotia | English | Virginia | Oregon | Nova Scotia | York | New | Bald | Rus | Bramley's | York | New | Bald | Rus | | |
| | Imperial | town | win | set | Seedling | Imperial | town | win | set | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | |
| | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | per bu. | |
| 1932-33 | | | | | | | | | | | | | | | | | | |
| Oct. | 2.60 | - | - | - | 1.95 | 1.82 | - | - | - | - | - | - | - | - | - | - | - | - |
| Nov. | 2.31 | 3.17 | - | 2.26 | 1.70 | 1.56 | 2.13 | - | - | - | - | - | - | - | - | - | - | 1.72 |
| Dec. | 2.51 | 3.26 | 1.78 | 2.43 | 1.80 | 1.69 | 2.20 | 1.38 | 1.38 | 1.38 | 1.38 | 1.38 | 1.38 | 1.38 | 1.38 | 1.38 | 1.38 | |
| Jan. | 2.35 | 3.26 | 1.85 | 2.43 | 1.82 | 1.65 | 2.25 | 1.46 | 1.46 | 1.46 | 1.46 | 1.46 | 1.46 | 1.46 | 1.46 | 1.46 | 1.46 | 1.92 |
| Feb. | 2.35 | 3.26 | 1.75 | 2.26 | 2.29 | 1.68 | 2.29 | 1.47 | 1.47 | 1.47 | 1.47 | 1.47 | 1.47 | 1.47 | 1.47 | 1.47 | 1.47 | 1.90 |
| Mar. | 2.48 | 3.19 | 1.53 | 2.05 | 2.63 | 1.75 | 2.25 | 1.29 | 1.29 | 1.29 | 1.29 | 1.29 | 1.29 | 1.29 | 1.29 | 1.29 | 1.29 | 1.73 |
| Average | 2.43 | 3.23 | 1.73 | 2.29 | 2.03 | 1.69 | 2.22 | 1.40 | 1.40 | 1.40 | 1.40 | 1.40 | 1.40 | 1.40 | 1.40 | 1.40 | 1.40 | 1.83 |

Compiled by the Foreign Agricultural Service from weekly British Agricultural Market Report. Reduced to bushels.

a/ Two grades are reported. The highest grade has been used in this compilation
b/ Par of exchange \$4.8667. c/ The United Kingdom went off the gold standard Sept. 21, 1931, and Canada, Oct. 19, 1931. d/ October 1931, to date converted from sterling at the Canadian rate. Earlier rates at par.

XV. APPLES: Monthly average prices paid for Yorks and Baldwins at Liverpool and New York, 1927-28 to 1932-33 a/

| Date | LIVERPOOL | | | | | | NEW YORK b/ | | | | | | Liverpool Price in Terms of New York Price | | | | | |
|---------|-----------|----------|----------|----------|----------|----------|-------------|-----------|----------|----------|----------|----------|--|-----------|----------|----------|----------|----------|
| | Baldwins | Yorks | Baldwins | Yorks | Baldwins | Yorks | c/ | Imperials | Baldwins | Yorks | Baldwins | Yorks | c/ | Imperials | Baldwins | Yorks | Baldwins | Yorks |
| | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars |
| | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. | per bbl. |
| 1927-28 | | | | | | | | | | | | | | | | | | |
| Oct. | 7.55 | 7.99 | 7.55 | 7.99 | 5.10 | 5.31 | 148 | 150 | | | | | | | | | | |
| Nov. | - | 6.70 | - | 6.70 | 5.94 | 5.73 | - | 117 | | | | | | | | | | |
| Dec. | - | 7.54 | - | 7.54 | 6.30 | 6.12 | - | 123 | | | | | | | | | | |
| Jan. | - | 8.13 | - | 8.13 | 6.45 | 6.78 | - | 120 | | | | | | | | | | |
| Feb. | 7.28 | 8.42 | 7.28 | 8.42 | 7.29 | 7.35 | 100 | 115 | | | | | | | | | | |
| Mar. | 6.57 | 9.31 | 6.57 | 9.31 | 8.01 | 8.04 | 82 | 116 | | | | | | | | | | |
| Average | 7.13 | 8.02 | 7.13 | 8.02 | 6.52 | 6.56 | 109 | 122 | | | | | | | | | | |
| 1928-29 | | | | | | | | | | | | | | | | | | |
| Oct. | 4.64 | 5.23 | 4.64 | 5.23 | 4.44 | 3.87 | 105 | 135 | | | | | | | | | | |
| Nov. | - | 6.25 | - | 6.25 | 5.16 | 4.26 | - | 147 | | | | | | | | | | |
| Dec. | 6.83 | 7.39 | 6.83 | 7.39 | 5.19 | 4.65 | 132 | 159 | | | | | | | | | | |
| Jan. | 5.99 | 7.05 | 5.99 | 7.05 | 5.31 | 4.41 | 117 | 160 | | | | | | | | | | |
| Feb. | 5.56 | 6.73 | 5.56 | 6.73 | 5.13 | 3.90 | 108 | 173 | | | | | | | | | | |
| Mar. | 7.11 | 8.52 | 7.11 | 8.52 | 5.16 | - | 138 | - | | | | | | | | | | |
| Average | 6.03 | 6.86 | 6.03 | 6.86 | 5.07 | 4.22 | 119 | 163 | | | | | | | | | | |

(Continued -)

XV. APPLES: Monthly average prices paid for Yorks and Baldwins at Liverpool and New York, 1927-28 to 1932-33. a/ (Continued).

| Date | LIVERPOOL | | | | NEW YORK <u>b/</u> | | | | Liverpool Price | |
|----------------|--------------------|------------|---------------------|------------|--------------------|------------|------------|----------------|-----------------|----------|
| | At par of exchange | | At prevailing exch. | | Baldwins: York | | | | in Terms of | |
| | Baldwins: | Yorks | Baldwins: | Yorks | c/ | | Imperials | New York Price | | |
| | New York | Virginia | New York | Virginia | New York | Virginia | New York | Virginia | Baldwins: | York |
| | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Per cent | Per cent |
| | : per bbl. | : per bbl. | : per bbl. | : per bbl. | : per bbl. | : per bbl. | : per bbl. | : per bbl. | | |
| <u>1929-30</u> | | | | | | | | | | |
| Oct. | - | 6.65 | - | 6.65 | - | 4.77 | - | - | | 139 |
| Nov. | 5.72 | 5.56 | 5.72 | 5.56 | 5.73 | 4.92 | 100 | - | | 113 |
| Dec. | - | 6.27 | - | 6.27 | 5.73 | 5.04 | - | - | | 124 |
| Jan. | - | 6.72 | - | 6.72 | 5.43 | 5.07 | - | - | | 133 |
| Feb. | - | 7.24 | - | 7.24 | 5.49 | 5.16 | - | - | | 140 |
| Mar. | 6.78 | 7.43 | 6.78 | 7.43 | 5.61 | 6.60 | 121 | - | | 113 |
| Average | 6.25 | 6.65 | 6.25 | 6.65 | 5.60 | 5.26 | 112 | - | | 126 |
| <u>1930-31</u> | | | | | | | | | | |
| Oct. | 5.87 | 6.78 | 5.87 | 6.78 | 3.60 | 3.36 | 163 | - | | 202 |
| Nov. | 5.70 | 6.34 | 5.70 | 6.34 | 3.45 | 3.75 | 165 | - | | 169 |
| Dec. | 5.36 | 6.99 | 5.36 | 6.99 | 4.23 | 5.10 | 127 | - | | 137 |
| Jan. | 5.67 | 7.54 | 5.67 | 7.54 | 4.23 | 4.95 | 134 | - | | 152 |
| Feb. | 6.29 | 7.24 | 6.29 | 7.24 | 4.59 | 5.43 | 137 | - | | 133 |
| Mar. | 7.06 | 8.27 | 7.06 | 8.27 | 5.19 | 5.70 | 136 | - | | 145 |
| Average | 5.99 | 7.19 | 5.99 | 7.19 | 4.22 | 4.72 | 142 | - | | 152 |
| <u>1931-32</u> | | | | | | | | | | |
| Oct. | 5.00 | 5.90 | 4.00 | 4.72 | - | 2.46 | - | - | | 192 |
| Nov. | 3.30 | 4.80 | 2.51 | 3.69 | - | 2.31 | - | - | | 160 |
| Dec. | - | 4.45 | - | 3.09 | 3.12 | 2.55 | - | - | | 121 |
| Jan. | 4.00 | 6.15 | 2.84 | 4.34 | 2.67 | 2.40 | 106 | - | | 181 |
| Feb. | 5.82 | 6.12 | 4.13 | 4.34 | 2.67 | 2.58 | 155 | - | | 168 |
| Mar. | 6.15 | 6.14 | 4.59 | 4.61 | 3.12 | 3.39 | 147 | - | | 136 |
| Average | 4.85 | 5.59 | 3.61 | 4.13 | 2.90 | 2.62 | 124 | - | | 158 |
| <u>1932-33</u> | | | | | | | | | | |
| Oct. | - | 6.73 | - | 4.71 | 2.49 | - | - | - | | - |
| Nov. | 5.86 | 7.12 | 3.94 | 4.79 | 2.55 | 3.00 | 155 | - | | 160 |
| Dec. | 5.84 | 6.70 | 3.93 | 4.51 | 3.12 | 3.33 | 126 | - | | 135 |
| Jan. | - | 7.33 | - | 5.06 | 2.88 | 2.84 | - | - | | 178 |
| Feb. | - | 7.09 | - | 4.98 | 3.05 | 3.05 | - | - | | 163 |
| Mar. | - | 7.48 | - | 5.29 | 3.04 | 2.99 | - | - | | 177 |
| Average | 5.85 | 7.07 | 3.94 | 4.89 | 2.86 | 3.04 | 145 | - | | 174 |

Compiled by the Foreign Agricultural Service from weekly cables received from the London office of the United States Department of Agriculture.

a/ Liverpool prices are for the U.S. No.1 grade, $2\frac{1}{4}$ inch minimum and New York prices are U.S. No.1, $2\frac{1}{2}$ inch minimum.

b/ York prices in 1930-31 are based on only a few quotations and may not be very representative.

c/ Some Maine Baldwin's included.

XVI. DRIED APPLES: United States exports by countries,
July to June

Unit value..... \$195 : \$257
Compiled by the Foreign Agricultural Service from the official records of the
Bureau of Foreign and Domestic Commerce. Converted from pounds to short tons.

XVII. CANNED APPLES AND SAUCE: United States exports by countries,
July to June

| Country | Average: | | | | | | | | | | | | | |
|--------------------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|---------|--|---------|--|---------|--|
| | 1926-27 | | 1927-28 | | 1928-29 | | 1929-30 | | 1930-31 | | 1931-32 | | 1932-33 | |
| | Cases | | Cases | | Cases | | Cases | | Cases | | Cases | | Cases | |
| United Kingdom.... | 298,713 | : 256,189 | : 514,506 | : 370,414 | : 282,303 | : 344,425 | : 309,653 | : 337,361 | | | | | | |
| Irish Free State.. | 7,562 | : 5,565 | : 12,541 | : 10,169 | : 6,528 | : 8,433 | : 11,610 | : 9,652 | | | | | | |
| Germany..... | 1,920 | : 320 | : 1,068 | : 7,004 | : 6,581 | : 3,379 | : 2,050 | : 3,001 | | | | | | |
| Netherlands..... | 3,462 | : 384 | : 2,863 | : 1,303 | : 2,703 | : 1,072 | : 2,600 | : 1,411 | | | | | | |
| Other Europe..... | 453 | : 267 | : 8,355 | : 3,895 | : 91 | : 2,412 | : 50 | : 680 | | | | | | |
| Total Europe.... | 312,110 | : 262,725 | : 539,133 | : 391,785 | : 398,205 | : 350,791 | : 325,963 | : 352,105 | | | | | | |
| Canada..... | 534 | : 1,094 | : 1,545 | : 332 | : 1,722 | : 1,005 | : 1,602 | : 3,023 | | | | | | |
| Panama..... | 971 | : 1,008 | : 996 | : 1,250 | : 1,218 | : 1,085 | : 1,251 | : 872 | | | | | | |
| Philippines..... | 1,358 | : 2,316 | : 2,495 | : 2,427 | : 1,672 | : 2,114 | : 1,618 | : 1,278 | | | | | | |
| Others..... | 8,733 | : 7,786 | : 8,348 | : 5,399 | : 4,534 | : 6,960 | : 3,046 | : 1,539 | | | | | | |
| Total exports... | 324,006 | : 274,929 | : 552,317 | : 401,172 | : 307,351 | : 371,955 | : 333,480 | : 358,820 | | | | | | |
| | : 1,000 | : 1,000 | : 1,000 | : 1,000 | : 1,000 | : 1,000 | : 1,000 | : 1,000 | | | | | | |
| | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | Dollars | | | | | | |
| Value exports... | 998 | : 802 | : 1,453 | : 1,053 | : 749 | : 1,011 | : 735 | : 686 | | | | | | |
| | \$7.20 | : \$8.22 | : \$2.67 | : \$2.62 | : \$2.64 | : \$2.72 | : \$2.20 | : \$1.91 | | | | | | |

Unit value.....: \$3.08 : \$2.92 : \$2.63 : \$2.62 : \$2.44 : \$2.75 : \$2.20 . \$1.
Compiled by the Foreign Agricultural Service from the official records of the
Bureau of Foreign and Domestic Commerce. Converted from pounds to cases at 50
pounds to the case of 24 No. 2 $\frac{1}{2}$ cans.

PEARS

The Market Situation: The market for fresh pears in the United Kingdom opened strong due largely to short supplies and the sound condition of the fruit. It was not long, however, before the market weakened. This was because of the heavy influx of Continental supplies and the warm weather that prevailed in Europe the latter part of August. The warm weather caused American pears to ripen very quickly after being unloaded. The uncertainty that prevailed because of fluctuating exchange rates, the pending changes in the British duty growing out of the Ottawa conference, French quota regulations and other disturbing factors did much to weaken demand. As the season advanced gold prices declined to very low levels. From the standpoint of returns 1932-33 was very unsatisfactory. Although prices were low the volume exported was gratifying. Total shipments reached 2,400,000 bushels or just about 300,000 bushels under 1930-31 which was the peak export season. The proportion of the fresh crop exported was 13.3 per cent which was slightly higher even than the record 1930-31 season. (See table XIX, page 58.)

More pears were exported to Europe than in any previous year. Of the total exports of approximately 2,400,000 bushels over 2,000,000 went to Europe. Shipments to all European countries except Belgium were above average and in most cases of record proportions. As usual the United Kingdom took the largest amount followed by France, Canada, the Netherlands, Germany, Sweden, Brazil, and Argentina to mention the most important. The only serious decline in exports was to Canada. This is to be explained mainly by the increase in the Canadian duty. Exports by countries are given in detail in table XX, page 57.

American growers were unable to maintain high enough selling prices for fresh pears in the United Kingdom during 1932-33 to cover the increase in the duties and the discount on sterling. The situation was unsatisfactory in most other countries also. For example: In December 1930, Washington extra-fancy Winter Nellis pears sold at Liverpool at an average price of 11s. 9d. a box; in December 1931, the average price was 12s. 8d. per box; and in December 1932 it was 11s. 10d. In other words in terms of sterling, or from the point of view of the British consumer, prices registered little change in the 3 years. From the standpoint of returns to American shippers there was a great difference. The 1930 gross price in terms of gold dollars was \$2.86, the 1931 price \$2.17, and the 1932 price \$1.91. From the latter the duty of roughly \$0.29 had to be deducted which left only a gross return of \$1.62. This is a decline over the 1930 price of 43 per cent. The decline is even more striking when it is recalled that the 1930 pear crop in the United States was the largest on record. In the case of California Winter Nellis the decline in the gross price for 1932 over 1930 was 51 per cent. This information is tabulated in table XVIII on the following page.

XVIII. WINTER NELIS PEARS: Average price at Liverpool in December

| | Washington Winter Nelis | | | | California Winter Nelis | | | | | | | | | |
|----------|-------------------------|-----|-----------------------|------------------|-------------------------|------|-----------------------|------------------|---|------|------|------|------|---------|
| | Par | Par | Prevail. exchange: | Gross return: | Par | Par | Prevail. exchange: | Gross return: | | | | | | |
| | s. | d. | Dollars | Dollars | s. | d. | Dollars | Dollars | | | | | | |
| 1931.... | 11 | 9 | : | 2.86 | : | 2.86 | 14 | 6 | : | 3.53 | : | 3.53 | : | 3.53 |
| 1932.... | 12 | 8 | : | 3.08 | : | 2.17 | 15 | 4 | : | 3.73 | : | 2.59 | : | 2.59 |
| 1933.... | 11 | 10 | : | 2.88 | : | 1.91 | a/ 1.62 | 12 | 4 | : | 3.00 | : | 2.01 | a/ 1.72 |

Compiled by the Foreign Agricultural Service from official sources.

a/ Less duty of around \$0.29 a box.

Pears have suffered along with apples and other commodities from the market restrictions that have been adopted in the last few years. Practically no foreign market for American pears has failed to raise barriers of some sort in the last two years. Most serious has been the tariff of 4s. 6d. per cwt. raised in United Kingdom (\$0.30 a box). The duty together with the exchange situation made trading very difficult. During 1932-33 the depreciation on sterling was about 30 per cent. The increase in the duty and other import restrictions in Canada resulted in a curtailment of exports. For a list of various trade barriers and duties in effect in the 1932-33 season see the table on page 36.

Quality and Condition: A certain amount of criticism was heard in regard to quality. Certain shipments showed an unusually large percentage of russetting. Boxes frequently were very badly mixed. Some fruits were good, being smooth, bright and clean; others, however, were more or less blemished and badly russeted, some pears showing a solid russetting.

Sizes also were sometimes more or less irregular. Some brands marked as 150 contained pears no larger than competitive brands marked 180's. Buyers are very expert in detecting these discrepancies. If a size is somewhat smaller than competitive brands it is immediately discovered. One brand is constantly being compared to another, which makes competition very keen at all times. The empty boxes are also weighed. Buyers expect full weight and if certain marks appear flat or feel light, they are weighed and checked with other marks. If they average a few pounds lighter than competitive brands, a complaint follows. If demand is active, complaints are less numerous, but when the market is slow no small detail is overlooked. The tendency in Europe is definitely toward the heavy pack. Most buyers insist on a well-rounded crown and any packs which are flat and loose are usually sold at a discount. A few shippers, however, are of the opinion that a heavy pack, or one carrying a large bulge, results in more or less bruising. This is not borne out as heavy packs show no more bruising than light crowned packs. Loose packs show more bruising than packs having an excessively heavy bulge.

As mentioned earlier, unseasonably warm weather in August in the United Kingdom caused pears to ripen very quickly after being removed from the boat. Pears which showed a hard green stage upon being landed turned very quickly and were yellow the following day. Pears, like most fruits sold in the United Kingdom are not ordinarily placed in cold storage after removal from the ship. Late keeping varieties however such as Winter Nelis are frequently stored upon arrival, depending largely upon market conditions. Most firms have their own warehouses or storage rooms and since the weather is usually sufficiently cool to hold fruit for the required marketing period, the extensive development or use of cold storage has not been considered essential. Pears brought from refrigerated chambers into an outside temperature of 75° or 80° F. ripen very quickly and frequently it is but a question of a few hours before hard green fruit begins to take on color. Bartletts are particularly difficult to handle for this reason and since their period of endurance is limited buyers are inclined to operate with considerable caution.

The possibility of expanding our export trade in pears, especially of the Bartlett variety, depends largely upon the ability of shippers and carriers to land the fruit at destination in marketable condition. By marketable condition is meant the property of fruit to withstand or hold up during a reasonable marketing period. Just to have pears hold up long enough to be discharged from the ship in firm condition is not satisfactory. It must be hard and sufficiently green to allow for the few intervening days which are required to place it before the consumer. When fruit is full-ripe or even well advanced in maturity, it must be sold quickly. A receiver is forced to sell at lower prices under such conditions. The fruit trade relies upon a commodity which has some endurance and which permits them to hold it a few days if necessary in order to take advantage of the best market. If pears, or, in fact, any commodity, arrive full-ripe, or showing signs of decay, it is good business to dispose of them at once, irrespective of present conditions or immediate outlook. The first loss on shipments of this character is usually the smallest loss. If pears are loaded on board ship in good, hard, green condition and with the orchard-heat removed, there is no reason why they cannot be carried successfully to Europe. This is assuming, of course, that proper temperatures enroute are maintained.

The first shipment of Northwest pears via Panama was somewhat of a disappointment. Although the fruit arrived in what appeared to be good condition it did not have the proper feel. Instead of being hard firm, it felt springy or rubbery, and with a distinct tendency toward shrivelling. The pack, in many instances was slack, with some fruits frequently below the ends of the boxes, and with the center of the crown only slightly higher than the center of the box.. Two days after discharge these pears showed a wide variation in degree of ripeness, hard-green and full-ripe pears being mixed in the same box. The fruit did not ripen properly and did not develop its full eating quality. It was flat in taste and the flesh rather tough and rubbery. It may have been harvested somewhat immature.

The season on Bartletts showed a decided improvement over previous year. There was only one bad shipment. The outcome of this one ship was a big disappointment to everyone. Hood River Bartletts, which were pre-cooled and delivered to the ship in excellent condition, arrived full-ripe and had to be sold quickly. Medford fruit, on the same ship and handled similarly to the Hood River shipment, arrived in variable condition. Some were overripe, others full-ripe and still others very wasty. Since previous and subsequent shipments arrived in satisfactory condition it is difficult to understand the outcome of this particular shipment, especially in view of the fact that suitable conditions were said to obtain on the voyage.

Despite a few difficulties attending the pear movement, shippers were well rewarded for the additional precautions which were taken with last season's shipments. No statements were heard bearing on the impossibility of being able to land American Bartletts on European markets in good, hard condition.

New York pears were unusually well received. Most shipments, except for slackness, landed in good condition and were readily cleared at good prices. They were packed in barrels and baskets. Pears are more difficult to pack in boxes and barrels because of their shape. However, there is no reason why they should arrive several inches slack. In packing for export, one or two points should be given more attention. A tightly packed face is essential. By laying a good tight face and rocking the basket frequently during the process of filling and by filling a little heavier than for domestic markets, the basket should arrive in more satisfactory condition. This additional weight should allow for shrinkage and should tend to eliminate some of the looseness which results from the settling in transit. Another point worthy of consideration is the more general use of an excelsior pad. This prevents the face layer from becoming bruised thus presenting a more attractive appearance to the buyer. Usually shipments packed with excelsior pads sold at higher prices.

Comments on Varieties: California Bartletts finished the last week in September and the deal was perhaps the best it has ever been from the standpoint of condition. The precautions taken on the shipping end were more than justified. None of the disastrous experiences of the 1931-32 season occurred and many favorable comments were heard about the California deal as a whole.

Supplies of New York Bartletts were unusually heavy. They were packed in both barrels and baskets and for the most part arrived in satisfactory condition. Very few packages arrived tight but the fruit was hard, green and without excessive bruising.

It was demonstrated that it is possible to land Bartlett pears in good condition. With a few exceptions the fruit was well received and made notable headway. The Bartlett is a popular variety in Europe. It is essential that Bartletts be precooled and placed on board ship in good condition if they are expected to arrive on the other side in merchantable condition.

Hardys frequently encountered some difficulty largely because of condition. Although the outward appearance of such fruit seemed good the inside told a different story. The skin was unblemished, still very green and showed no evidence of mold or decay. The inside, however, was a watery mass and frequently black. In some instances breakdown occurred at the margin of the core and worked to the outside. The cores in some cases were hard and dropped away from the flesh in a single piece. Certain specimens resembled water core, the skin and flesh being a deep, watery-green color. The condition was much more pronounced in the larger sizes and was not confined to any particular position in the box. Some boxes showed 6 to 8 fruits so affected, while others ran as high as 15 or 20 out of a count of 135 to 150 and a few even higher.

Anjous were received in substantial quantities throughout the season. Medford fruit was frequently criticized because of excess russetting in the Fancy grade. While russetting may be permitted in this grade it is not a good selling point and buyers object to fruit showing solid russetting. Anjous were held on the market too long and toward the end of the season were showing considerable waste.

Winter Nelis, while regarded as one of our best export varieties, did not hold up as usual. The fruit developed a weak condition at the stem end and apparently started at a point where the stem entered the fruit. The rot, once started, spread over the entire fruit, resulting in complete breakdown. Sections of the fruit cut longitudinally showed that the stems were black from the point where they entered the fruit to the core. Fruits so affected had a peculiar characteristic odor, which was quite distinctive from that occasioned by ordinary rot.

The general outturn of Winter Nelis was more or less variable. Certain marks arrived in good condition while other marks on the same ship were showing more or less waste. All markets complained about the condition of this variety and its unreliability.

Canned and Dried Pears

Canned pears: Exports of canned pears in the 1932-33 season amounted to 1,200,000 50-pound cases as compared with 1,400,000 in 1931-32 and the 5-year average, 1926-27 to 1930-31, of 1,300,000 cases. The volume of exports has been fairly well maintained but the value, as in the case of most other agricultural products, has declined. Exports in 1932-33 were valued at \$3,800,000. This works out at \$3.15 per case as compared to a unit value in 1931-32 of \$3.46 and to \$4.89 in the 5-year period under survey. Practically all of the exports were shipped to the United Kingdom as in past years. There was no notable increase in shipments to other countries. Exports by countries are given in table XXI on page 58.

Dried pears: About 3,100 short tons of dried pears were exported in 1932-33. This was somewhat larger than the quantity shipped last season but below 1930-31. Total exports were valued at \$386,000, or the lowest in the last 4 years. The unit value in 1932-33 was \$123 as compared with \$150 in 1931-32 and \$159 per short ton in 1930-31. Europe again proved to be the principal outlet. Germany took 1,434 tons, France 700, the Netherlands 323, the United Kingdom 288 and Sweden 168 tons, to mention the most important. (See table XXII, page 58).

XIX. PEARS: United States production, exports, and the proportion exported.

| Year | :Boxed: | :Bar- | :Total: | Canned | :Dried | :Amount: | :Canned: | Dried |
|----------|-----------|----------|------------|------------|------------|----------|-----------------|----------------------|
| | : crop: | :releas: | :crop | :in terms: | :in terms: | :used | :Fresh Exports: | pear |
| | : : crop: | : :fresh | a/: :fresh | b/: :fresh | : :fresh | : :fresh | : : pack | :output |
| | :Mill. | :Mill. | :Mill. | :Mill. | :Mill. | :Mill. | :Per | :1000 : Short |
| | :bush. | :bush. | :bush. | :bush. | :bush. | :bush. | :cent | :cases : tons |
| | : | : | : | : | : | : | : | : |
| 1922-23. | 10.1 | 10.6 | 20.7 | 2.4 | 1.2 | 17.0 | .7 | 4.3 : 2,450 : 6,000 |
| 1923-24. | 10.4 | 7.4 | 17.8 | 1.7 | .2 | 15.9 | 1.0 | 6.3 : 1,739 : 1,000 |
| 1924-25. | 9.2 | 9.6 | 18.9 | 2.1 | .6 | 16.2 | .8 | 5.1 : 2,108 : 2,750 |
| 1925-26. | 12.0 | 8.7 | 20.7 | 3.5 | .7 | 16.5 | 1.4 | 8.6 : 3,477 : 3,504 |
| 1926-27. | 14.7 | 10.5 | 25.2 | 3.3 | .8 | 21.1 | 1.5 | 7.0 : 3,266 : 4,253 |
| Average: | 11.3 | 9.4 | 20.7 | 2.6 | .7 | 17.3 | 1.1 | 6.3 : 2,608 : 3,501 |
| 1927-28. | 11.7 | 6.6 | 18.4 | 2.6 | .7 | 15.0 | 1.0 | 6.8 : 2,648 : 3,441 |
| 1928-29. | 16.1 | 8.1 | 24.2 | 4.1 | 1.1 | 19.0 | 1.7 | 8.7 : 4,124 : 5,570 |
| 1929-30. | 14.8 | 6.4 | 21.2 | 4.2 | .8 | 16.1 | 1.2 | 7.7 : 4,221 : 4,157 |
| 1930-31. | 19.4 | 6.2 | 25.5 | 4.2 | .9 | 20.5 | 2.7 | 13.2 : 4,175 : 4,508 |
| 1931-32. | 15.1 | 7.9 | 23.0 | 3.7 | .9 | 18.5 | 1.8 | 9.8 : 3,652 : 4,370 |
| Average: | 15.4 | 7.0 | 22.5 | 3.8 | .9 | 17.8 | 1.7 | 9.5 : 3,764 : 4,409 |
| 1932-33. | 17.1 | 4.9 | 22.0 | 3.1 | .9 | 18.0 | 2.4 | 13.3 : 3,088 : 4,500 |

Compiled by the Foreign Agricultural Service from official and trade sources.

a/ Converted to fresh basis at one case of canned pears (24-No. 2½ cans) to one bushel of fresh fruit.

b/ Converted to fresh basis at one short ton equals 200 bushels pears.

XX. PEARS: Exports from the United States by countries of destination, July to June

| Country and Month | :Average: | | | | | | : 1932-33 : |
|----------------------|----------------------|----------------------|----------------------|----------------------|--------------------------|----------------------|-------------|
| | 1927-28 | 1928-29 | 1929-30 | 1930-31 | 1926-27 to 1930-31 | 1931-32 | |
| | : 1,000 : bushels | : 1,000 : bushels | |
| United Kingdom... | 379.9 | 698.0 | 444.5 | 1,379.6 | 721.0 | 948.8 | 1,221.3 |
| Netherlands.... | 10.5 | 21.8 | 17.7 | 196.2 | 53.6 | 91.8 | 212.0 |
| Germany..... | 2.7 | 12.5 | 24.3 | 132.4 | 34.6 | 30.8 | 93.7 |
| France..... | 0 | 2.1:a/ | | 34.6 | 7.3 | 200.2 | 416.1 |
| Belgium..... | 0:a/ | | .5 | 22.6 | 4.6 | 14.4 | .4 |
| Sweden..... | 3.5 | 25.9 | 23.4 | 63.5 | 23.6 | 48.3 | 70.3 |
| Denmark..... | 1.6 | 0 | 1.6 | 9.4 | 2.5 | 26.0 | 7.4 |
| Norway..... | a/ | .5 | 2.2 | 2.0 | 1.0 | 5.8 | 6.8 |
| Finland..... | 0:b/ | :b/ | :b/ | :b/ | | 1.6 | 2.3 |
| Other Europe.... | 0 | 2.0 | 1.7 | 6.3 | 2.0 | .6 | .1 |
| Total Europe.... | 398.2 | 762.8 | 515.9 | 1,846.6 | 850.2 | 1,368.3 | 2,030.4 |
| Canada..... | 442.4 | 648.7 | 465.4 | 602.0 | 542.7 | 325.5 | 236.3 |
| Brazil..... | 69.4 | 110.7 | 110.7 | 95.1 | 93.5 | 41.4 | 56.1 |
| Argentina..... | 37.4 | 55.0 | 78.1 | 66.8 | 56.1 | 29.6 | 28.6 |
| Cuba..... | 40.9 | 35.6 | 26.4 | 24.3 | 33.8 | 16.4 | 13.2 |
| Mexico..... | 13.8 | 18.0 | 17.6 | 16.1 | 15.2 | 2.2 | 3.2 |
| Panama..... | b/ | b/ | b/ | b/ | b/ | 4.8 | 6.3 |
| Philippines..... | b/ | b/ | b/ | b/ | b/ | 2.3 | 2.6 |
| Egypt..... | b/ | b/ | b/ | b/ | b/ | 2.3 | 4.6 |
| Others..... | 19.0 | 26.1 | 26.4 | 42.5 | 26.4 | 30.6 | 18.4 |
| Total..... | 1,021.1 | 1,656.9 | 1,240.5 | 2,693.4 | 1,617.9 | 1,814.0 | 2,399.7 |
| MONTH | : | : | : | : | : | : | : |
| July..... | 49.3 | 125.5 | 39.4 | 125.2 | 92.9 | 273.5 | 179.5 |
| August..... | 222.9 | 326.1 | 232.0 | 435.2 | 298.4 | 396.9 | 380.2 |
| September..... | 284.8 | 246.6 | 257.3 | 426.1 | 297.1 | 298.2 | 550.2 |
| October..... | 214.6 | 404.9 | 354.2 | 449.2 | 338.3 | 318.6 | 616.4 |
| November..... | 116.1 | 165.4 | 166.2 | 486.2 | 250.5 | 292.7 | 222.4 |
| December..... | 70.0 | 120.8 | 87.0 | 397.8 | 151.7 | 114.7 | 184.0 |
| January..... | 39.5 | 134.4 | 57.9 | 152.5 | 93.3 | 77.4 | 155.9 |
| February..... | 11.7 | 68.3 | 15.2 | 110.1 | 46.9 | 10.6 | 49.2 |
| March..... | 7.0 | 40.7 | 16.2 | 59.4 | 27.2 | 15.5 | 48.5 |
| April..... | 2.2 | 18.9 | 8.3 | 12.3 | 9.4 | 5.6 | 11.9 |
| May..... | 1.5 | 2.2 | 5.1 | 13.3 | 5.6 | 8.5 | .9 |
| June..... | 1.5 | 3.1 | 1.7 | 26.1 | 6.6 | 1.8 | .5 |
| Total bushels. | 1,021.1 | 1,656.9 | 1,240.5 | 2,693.4 | 1,617.9 | 1,814.0 | 2,399.7 |
| | : Thousand | : Thousand | |
| | : Dollars | : Dollars | |
| Total value.... | 3,618 | 4,905 | 4,210 | 6,614 | 4,648 | 3,936 | 4,115 |
| Unit value.... | \$3.54 | \$2.96 | \$3.40 | \$2.46 | \$2.87 | \$2.17 | \$1.71 |

Compiled by the Foreign Agricultural Service from official records of the Bureau of Foreign and Domestic Commerce. Converted from pounds to bushels of 50 pounds.

a/ Less than 500 bushels.

b/ Not available.

XXI. CANNED PEARS: United States exports by countries, July to June

- 58 -

| Country | 1927-28 | 1928-29 | 1929-30 | 1930-31 | 1931-32 | 1932-33 | Average | |
|------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--|
| | | | | | | | 1926-27 | |
| | | | | | | | 1927-28 | |
| United Kingdom | 936,433 | 1,478,198 | 956,530 | 1,375,251 | 1,185,793 | 1,360,473 | 1,156,381 | |
| Irish Free State | 7,876 | 13,552 | 12,781 | 10,654 | 10,254 | 17,021 | 15,920 | |
| France | 4,327 | 18,182 | 8,322 | 9,479 | 10,418 | 7,210 | 5,555 | |
| Germany | 3,773 | 9,171 | 5,487 | 3,297 | 5,304 | 2,084 | 1,378 | |
| Belgium | 1,210 | 3,127 | 2,618 | 2,097 | 2,080 | 1,326 | 1,249 | |
| Netherlands | 10,359 | 14,289 | 8,918 | 7,068 | 10,218 | 6,580 | 7,039 | |
| Denmark | 786 | 990 | 828 | 1,192 | 1,048 | 831 | 237 | |
| Norway | 2,156 | 1,568 | 2,400 | 6,878 | 2,960 | 565 | 701 | |
| Sweden | 6,471 | 6,511 | 7,909 | 4,906 | 6,341 | 5,161 | 2,951 | |
| Canada | 19,088 | 28,490 | 25,152 | 15,992 | 21,552 | 4,025 | 6,006 | |
| Cuba | 20,482 | 22,144 | 14,028 | 13,236 | 19,533 | 1,895 | 1,272 | |
| Argentina | 281 | 444 | 625 | 359 | 435 | 2,404 | 31 | |
| British India | 3,103 | 3,728 | 4,193 | 5,323 | 3,928 | 2,506 | 1,424 | |
| Netherlands | | | | | | | | |
| East India | 3,058 | 5,987 | 5,343 | 5,004 | 5,035 | 2,827 | 1,431 | |
| Philippines | 1,831 | 998 | 1,069 | 1,005 | 1,226 | 1,063 | 814 | |
| Others | 32,195 | 45,655 | 37,969 | 25,352 | 35,838 | 19,027 | 12,847 | |
| Total exports | 1,053,429 | 1,653,034 | 1,094,172 | 1,487,091 | 1,321,963 | 1,454,998 | 1,215,236 | |
| | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | |
| | Dollars | |
| Value exports | 5,503 | 7,813 | 6,287 | 6,065 | 6,464 | 4,966 | 3,830 | |
| Unit value | \$5.22 | \$4.73 | \$5.75 | \$4.08 | \$4.89 | \$3.46 | \$3.15 | |

Compiled by the Foreign Agricultural Service from the official records of the Bureau of Foreign and Domestic Commerce. Converted from pounds to cases of 24 No. 2½ cans at 50 pounds to the case.

XXII. DRIED PEARS: United States exports by countries, July to June

| Country | 1929-30 | 1930-31 | 1931-32 | 1932-33 | Short tons | Short tons | Short tons | Short tons |
|----------------|---------|---------|---------|---------|------------|------------|------------|------------|
| | | | | | Short tons | Short tons | Short tons | Short tons |
| Germany | 912 | 1,726 | 1,076 | 1,434 | | | | |
| United Kingdom | 258 | 587 | 528 | 288 | | | | |
| France | 34 | 712 | 707 | 700 | | | | |
| Netherlands | 172 | 474 | 212 | 323 | | | | |
| Sweden | 123 | 117 | 138 | 168 | | | | |
| Denmark | 18 | 47 | 69 | 16 | | | | |
| Norway | 3 | 9 | 6 | 2 | | | | |
| Other Europe | 123 | 190 | 170 | 101 | | | | |
| Total Europe | 1,648 | 3,862 | 2,906 | 3,032 | | | | |
| Canada | 99 | 57 | 83 | 48 | | | | |
| Others | 80 | 99 | 50 | 49 | | | | |
| Total exports | 1,827 | 4,018 | 3,039 | 3,129 | | | | |
| | 1,000 | 1,000 | 1,000 | 1,000 | | | | |
| | Dollars | Dollars | Dollars | Dollars | | | | |
| Value exports | 503 | 640 | 457 | 386 | | | | |
| Unit value | \$275 | \$159 | \$150 | \$123 | | | | |

Compiled by the Foreign Agricultural Service from the official records of the Bureau of Foreign and Domestic Commerce.

GRAPES

Exports of fresh grapes from the United States in the 1932-33 season were about 14,700 short tons as against 13,300 tons in 1931-32. Exports, however, were only a little over half those shipped in 1930-31 and 1929-30. The value of the exports in 1932-33 was less than in the preceding year despite the increase in the tonnage which moved out or \$1,100,000 compared with \$1,385,000 in 1931-32. The declared value per pound dropped from 5¢ in 1931-32 to $3\frac{1}{2}$ ¢ in 1932-33. The decline in the exports in the last two seasons is largely due to the decline in the exports to Canada, Mexico and Cuba. There has been an increase in the exports to the United Kingdom and Panama. Of the 14,700 short tons exported in 1932-33, 57.6 per cent went to Canada, 15.8 per cent to the United Kingdom, 5.9 per cent to the Philippines, 5.1 per cent to Cuba, 2.8 per cent to Mexico and 12.8 per cent to all other countries. Exports are shown in greater detail in table XXIII, page 60.

Exports of grapes to Europe reached 2,504 short tons of which 2,324 went to the United Kingdom. Prices were extremely low in England and little if any money was made on the deal. Emperor grapes, which made up the bulk of the shipments, lost operators on an average about 4s. (\$0.70) a package during the height of the season. Late shipments of Emperors struck a better market but the condition of the fruit was poor. During February the condition was most disappointing. Certain marks were quite defective and had to be sold for whatever they would bring, in fact they were difficult to move at any price. A large quantity of fruit during February had to be cleared at from 4/- to 6/- (\$0.70 to \$1.05) a chest. The market proved to be very weak for red grapes and even the light shipments were more than the markets could absorb at profitable prices. It was frequently stated during the season that too many people entered into the deal and consequently broke the market. Prices in early November at London were 13/- to 14/- (\$2.15 to \$2.32) per chest but in the latter part of the month dropped to from 9/- to 10/6 (\$1.47 to \$1.72). This level prevailed during December with a slight increase in the first half. Prices firmed during January and the month closed around 10/6 (\$1.78) per chest. In the early part of February prices jumped to 13/6 (\$2.31) only to decline to very low levels in the last part of the month with the breakdown in condition of the fruit.

The quality and condition of Emperors up until February was very satisfactory - in fact, it left little to be desired. Judging by the condition of most of the fruit observed during February, it would seem that the marketing season should not be extended beyond the end of January. The Emperor appears to be our best export grape and it should continue to grow in favor. Shipments, however, should be kept in moderation and supplies limited according to the capacity of the market.

XXIII. GRAPES: Total United States exports by countries,
July to June.

| Country and Month | 1929-30 | 1930-31 | 1931-32 | 1932-33 |
|-----------------------------|-------------|-------------|-------------|-------------|
| | Pounds | Pounds | Pounds | Pounds |
| United Kingdom..... | 136,641 | 2,192,794 | 1,217,205 | 4,649,371 |
| Germany..... | 71,580 | 1,715 | 118,350 | 1,750 |
| Sweden | 11,860 | 423,212 | 236,100 | 192,554 |
| Denmark | 2,720 | 1,696 | 9,600 | 11,226 |
| Norway..... | 17,500 | 4,200 | 6,000 | 50,200 |
| Other Europe..... | 18,448 | 2,600 | 9,187 | 102,913 |
| Total Europe..... | 258,749 | 2,626,217 | 1,596,442 | 5,008,014 |
| Canada..... | 33,976,766 | 34,078,435 | 18,456,148 | 16,893,608 |
| Newfoundland & Labrador.... | 136,036 | 176,077 | 105,252 | 107,806 |
| Mexico..... | 3,043,272 | 3,041,730 | 396,856 | 818,272 |
| Cuba..... | 3,846,221 | 3,642,150 | 1,608,646 | 1,509,351 |
| Panama..... | 249,229 | 276,189 | 384,069 | 481,979 |
| Venezuela..... | 363,394 | 519,587 | 199,766 | 151,114 |
| Brazil..... | 12,231 | 96,432 | 135,390 | 90,900 |
| British India..... | 3,432 | 185,718 | 209,622 | 285,452 |
| British Malaya..... | 453,193 | 283,520 | 308,528 | 217,133 |
| Ceylon..... | 182,443 | 255,607 | 161,235 | 130,030 |
| Java and Madura..... | 222,348 | 251,708 | 292,677 | 299,823 |
| China..... | 215,797 | 115,440 | 292,726 | 207,046 |
| Hongkong..... | 521,463 | 416,594 | 367,383 | 431,892 |
| Philippines..... | 1,645,459 | 1,933,241 | 1,659,451 | 1,717,658 |
| New Zealand..... | 681,289 | 552,608 | 465,158 | 240,620 |
| Others..... | 1,347,006 | 1,347,884 | 973,841 | 760,864 |
| Total..... | 46,158,328 | 49,799,137 | 27,613,190 | 29,351,562 |
| July | 488,980 | 820,648 | 1,783,003 | 820,468 |
| August..... | 3,859,439 | 4,915,791 | 6,266,122 | 3,719,197 |
| September..... | 9,439,847 | 10,645,611 | 4,124,374 | 4,069,879 |
| October..... | 16,539,968 | 14,265,720 | 4,304,345 | 5,679,254 |
| November..... | 11,836,673 | 10,868,397 | 7,700,855 | 8,751,916 |
| December..... | 2,369,546 | 5,859,074 | 2,273,728 | 4,635,027 |
| January..... | 763,444 | 1,655,916 | 662,199 | 1,086,591 |
| February..... | 480,181 | 323,888 | 191,001 | 315,514 |
| March..... | 168,379 | 128,589 | 99,903 | 107,163 |
| April..... | 115,822 | 79,156 | 66,873 | 98,646 |
| May..... | 42,465 | 36,355 | 57,562 | 61,127 |
| June..... | 53,584 | 199,992 | 83,225 | 6,780 |
| Total quantity..... | 46,158,328 | 49,799,137 | 27,613,190 | 29,351,562 |
| Total value..... | \$2,424,192 | \$2,120,720 | \$1,384,672 | \$1,045,418 |
| Unit value..... | \$0.0525 | \$0.0426 | \$0.0501 | \$0.0356 |

Compiled by the Foreign Agricultural Service from the Monthly Summary of Foreign Commerce of the United States and the official records of the Bureau of Foreign and Domestic Commerce.